Tyler's VersaTrans TripTracker® **User's & Administrator's Guide**

VersaTrans TripTracker® 9.13

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Telephone Support

Toll-free Telephone Application Support is available by calling 800.775.5556.

E-mail Support

Application Support is also available via e-mail at: versatrans.support@tylertech.com.

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Chapter 1

Getting Started with VersaTrans TripTracker

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Welcome to VersaTrans TripTracker

Welcome to Tyler'sVersaTrans TripTracker. This guide is designed to show you the capabilities of VersaTrans TripTracker and how it can be used to make all aspects of field trip work easier, provide for standardized billing and provide all the people involved with up-to-date information about any trip.

VersaTrans TripTracker is a web based application. That means that VersaTrans TripTracker may be accessed by anyone with proper credentials from anywhere they have access to the internet. This means that drivers, requesters, approvers and transportation department personnel can all have appropriate access to VersaTrans TripTracker when they need it. Each user's login can be restricted to only show the data necessary for them to do their work. Requesters see current trips and statuses. Transportation clerks see all activity for the day or week, including trips that need to be assigned, billed, approved, and paid. VersaTrans TripTracker fully automates the field trip request and fulfillment process.

System Specifications

Workstation

The following web browsers are supported:

- Internet Explorer 6.0 or better.
- Mozilla Firefox version 2.0 or better for windows and Mac OS X

Network Servers

Minimum

Pentium IV, 1.8 GHz
512 MB RAM
15 MB disk space for VersaTrans TripTracker files
Microsoft Windows 2003 or 2008 Server (Standard) with IIS
IIS with ASP.NET 2.0 enabled and the latest security updates applied
Microsoft .NET framework 2.0, AJAX, and Report Viewer 2005

Recommended

Dual Pentium Xeon, 2.8 GHz
2 GB RAM
15 MB disk space for VersaTrans TripTracker files
Microsoft Windows 2003 or 2008 Server (Standard) with IIS
IIS with ASP.NET 2.0 enabled and the latest security updates applied
Microsoft .NET framework 2.0, AJAX, and Report Viewer 2005

Database Server

VersaTrans TripTracker requires a database server to store its data.

Microsoft SQL Server Express 2005
Comes bundled with VersaTrans RP but has limits on the maximum database siz, amount of RAM it can use, and will only work on single processor machines.

Microsoft SQL Server Express 2008
Has limits on the maximum database siz, amount of RAM it can use, and will only work on single processor machines.

Microsoft SQL Server 2005 or 2008 Workgroup Edition
Requires separate licensing for larger multi-user installations (more than 5 concurrent users) on Windows servers.

Antivirus Software

Some antivirus software can be detrimental to performance of ASP.NET applications. We recommend using only those antivirus scanners that are certified for the version of the operating system used.

Installation Instructions

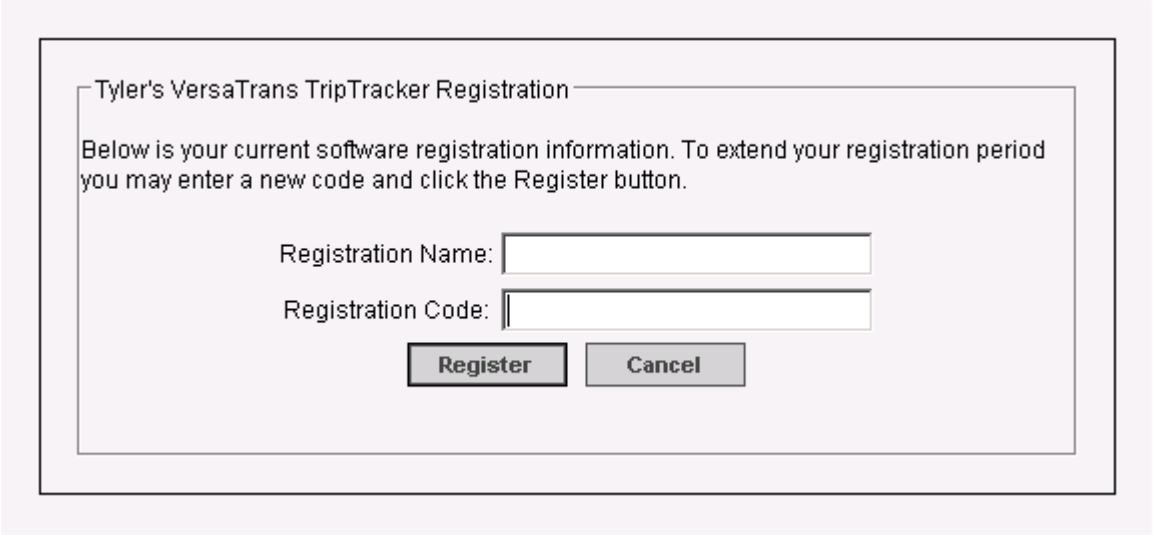
Please see, *Installation, Conversion & Integration* on page 295. The VersaTrans TripTracker Installation, Conversion & Integration Guide is also included on your VersaTrans TripTracker CD.

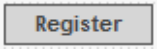
Starting VersaTrans TripTracker & Setting Up Password Retrieval

After installing VersaTrans TripTracker, (see, *Installation, Conversion & Integration* on page 295) you will need to open your web browser and navigate to the VersaTrans TripTracker address. The TripTracker address will be "http://<VTTTserver>/<virtual directory>". For example, if you installed your VersaTrans TripTracker virtual directory (named "triptracker" by default) on a server named "Transportation", your VersaTrans TripTracker address would be "http://Transportation/triptracker".

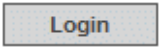
1. Open your web browser and navigate to the VersaTrans TripTracker address. If you have not previously registered VersaTrans TripTracker, the Tyler's VersaTrans TripTracker Registration dialog displays. If you have already registered, you can go to step 5.

2. Enter your Company/Registration Name in the Registration Name field.

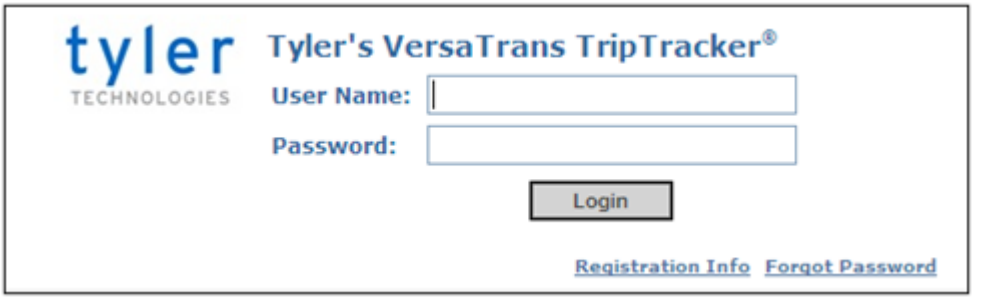

Tyler's VersaTrans TripTracker Registration
Below is your current software registration information. To extend your registration period you may enter a new code and click the Register button.
Registration Name:
Registration Code:
Register
Cancel

3. Enter your Registration Code. The code can be found with the VersaTrans TripTracker CD or can be provided by Technical Support.
4. Click  to display the VersaTrans TripTracker Login screen.

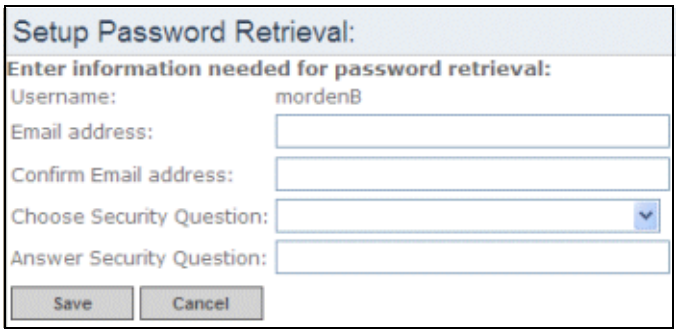
5. Enter your User Name and Password or enter the Administrator User Name and Password provided by VersaTrans.

6. Click 

. The Tyler's VersaTrans TripTracker dialog displays.



If you have enabled password retrieval (see, *Setting the System Options* on page 9) and an email address is not detected for the user account, the Setup Password Retrieval dialog is displayed.



7. Enter a valid e-mail address where you want your password sent in the event that it is forgotten.
8. Enter the same e-mail address again in the **Confirm Email** address box.
9. Click the drop-down button in the **Choose Security Question** box to display a list of security questions. Choose a security question.
10. Enter an answer for the security question in the **Answer Security Question** box.

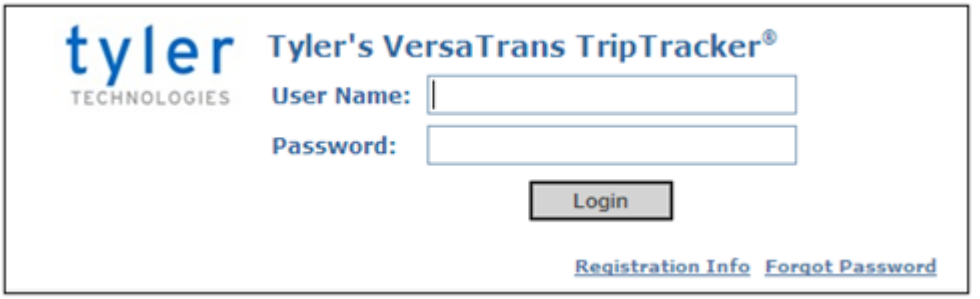
11. Click Save. The VersaTrans TripTracker Today screen displays.

Retrieving a Lost Password

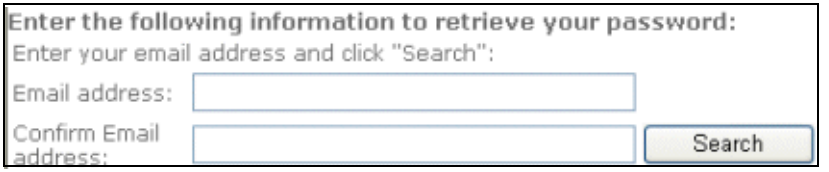
In the event that you forget your password, it can be retrieved if you have enabled password retrieval, see *Starting VersaTrans TripTracker & Setting Up Password Retrieval* on page 4.

To retrieve a lost password:

1. Launch the software/web browser that you use to access the World Wide Web.
2. Enter the VersaTrans TripTracker URL and go to that address. The Tyler's VersaTransTriptracker Login dialog displays.

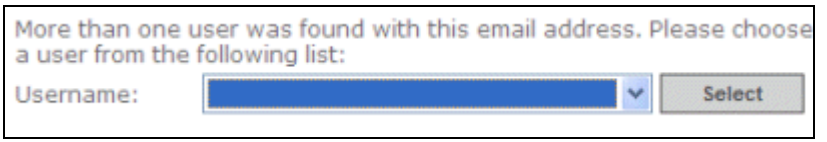


3. Click forgot password.

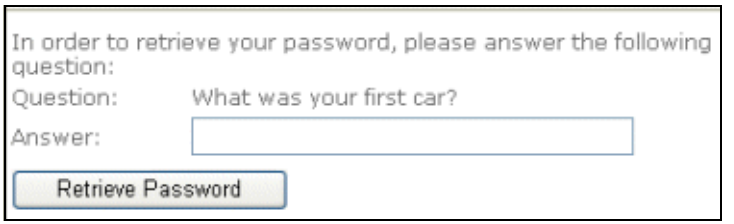

Enter the following information to retrieve your password:
Enter your email address and click "Search":
Email address:
Confirm Email address:
Search

4. Enter and confirm your e-mail address.
5. Click Search

   If more that one user shares an e-mail address, the following dialog is displayed.



6. Click and select a username from the drop-down list.
7. Click Select.


In order to retrieve your password, please answer the following question:
Question:
What was your first car?
Answer:
Retrieve Password

8. Enter the answer for the security question.
9. Click Retrieve Password

You will receive an e-mail message containing you password.

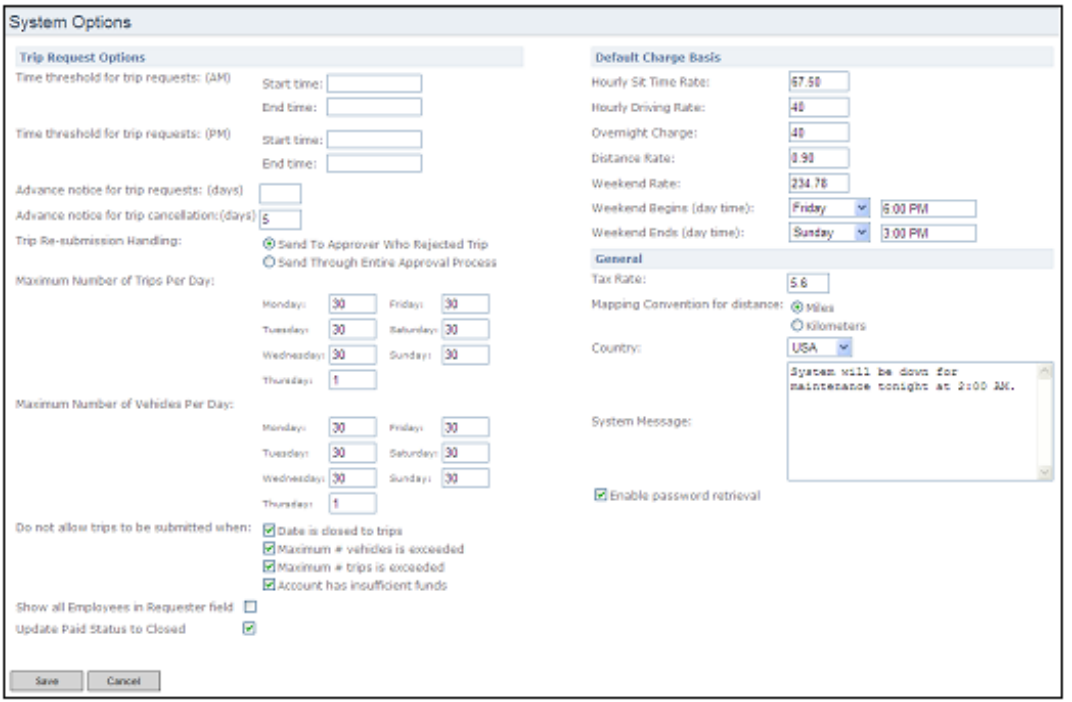
Setting the System Options

Administrators are able to define certain user-specific settings through the System Options feature. Users must have administrator privileges to access this feature.

To set the system options:

Path:) Admin > System Options

1. Follow the above path to display the System Options screen.



2. Complete these fields, selections, and drop down boxes as appropriate for your installation of VersaTrans TripTracker.

Time threshold for trip requests (AM) (PM)

Allows the System Administrator to enter morning (AM) times and afternoon (PM) times during which buses cannot be occupied with field trips. This setting will result in an immediate alert for Requesters if they request a trip during these times.

Note: *Requester will be unable to schedule a trip during these times.*

Advance notice for trip requests (days)

Number of days required between Trip Request date and Trip Departure date. You enter the number of days in this field.

Note: *Requester will be immediately alerted to the issue and will be blocked from submitting request if the number of day's threshold is not met.*

Advance notice for trip cancellation (days)

Number of days required between cancelling trip and Trip Departure date.

Note: *Requester will be immediately alerted to the issue and will be blocked from cancelling request if the number of day's threshold is not met.*

Trip Re-submission handling

Allows you to choose between two choices of how a rejected trip will be handled if it is resubmitted for approval:

- *Send To Approver Who Rejected Trip* - resubmitted request will be sent back to Approver who rejected the trip, bypassing any previous approvers
- *Send Through Entire Approval Process* - Resubmitted request will be sent through entire approval process, starting with the first level of approval.

Maximum Number of Trips Per Day

Allows you to enter the maximum number of trips that can be taken on each day of the week.

Note: *A number of 0 (zero) indicates that there are no trips allowed for that day. If a field is left blank, then there is no maximum number of trips for that day.*

Trips that will be counted when calculating the number of trips for a day include those in the following statuses:

- Requested
- Approved
- Scheduled

Maximum Number of Vehicles Per Day

Allows you to enter the maximum number of vehicles that can be requested on each day of the week.

Note: *A number of 0 (zero) indicates that there are no vehicles allowed for that day. If a field is left blank, then there is no maximum number of vehicles for that day.*

Vehicles that will be counted when calculating the number of trips for a day include those in the following statuses:

- Requested
- Approved
- Scheduled

Do not allow trips to be submitted when:

Date is closed to trips

Allows you to select the action to be taken when someone attempts to schedule a trip on a date that has been specified "Closed - No Trips" on the calendar.

- Option not checked - the user is warned but allowed to continue entering trip requests
- Option is checked - the user is not allowed to continue entering trip requests

When a user attempts to "Submit" or "Express Trip" a trip and the Trip date on the request is marked "Closed – No Trips" the following rules will apply:

- If the user is a Super User, or the System Option "Date is closed to trips" is not checked – the user will receive a warning when they click "Submit" or "Express Trip". The warning message will read as "**Warning**: This trip date has been marked as "Closed - No Trips". Click **OK** to continue and submit the trip request. Click **CANCEL** to return and modify the trip date(s)."
- If the user is not a Super User and the Option "Date is closed to trips" is checked - the Trip will not be submitted and an error message will be presented in the top section with other messages. The message will read: "**Warning**: The date of this trip had been marked as closed – no trips on the calendar. This trip has not been saved."

Maximum # vehicles is Exceeded

Allows you to select the action to be taken when the maximum number of vehicles has been exceeded for a day.

- Option not checked - the user is warned but allowed to continue entering trip requests
- Option is checked - the user is not allowed to continue entering trip requests

When you attempt to "Submit" or "Express Trip" a trip and the "Maximum Number of Vehicles" are exceeded for any of the dates involved in the trip (or if the maximum has already been exceeded) the following rules will apply:

- If the user is a Super User, or the System Option "Maximum Number of Vehicles Exceeded" is not checked – the user will receive a warning when they click "Submit" or "Express Trip". The message will read as "**Warning:** the Maximum Number of Vehicles has been exceeded for this date. Click OK to continue and submit the trip request. Click Cancel to return and modify the vehicles requested."

- If the user is not a Super User and the Option"Maximum Number of Vehicles Exceeded" is checked - the Trip will not be submitted and a warning message is displayed. The message will read: "**Warning:** The maximum number of vehicles has been exceeded for this date. This trip has not been saved**.**"

Maximum # trips is Exceeded

Allows you to select the action to be taken when the maximum number of trips has been exceeded for a day.

- Option not checked - the user is warned but allowed to continue entering trip requests
- Option is checked - the user is not allowed to continue entering trip requests

When you attempt to "Submit" or "Express Trip" a trip and the "Maximum Number of Trips" are exceeded for any of the dates involved in the trip (or if the maximum has already been exceeded) the following rules will apply:

- If the user is a Super User, or the System Option "Maximum Number of Trips Exceeded" is not checked – the user will receive a warning when they click "Submit" or "Express Trip". The message will read as "**Warning:** the Maximum Number of Trips has been exceeded for this date. Click OK to continue and submit the trip request. Click Cancel to return and modify the trip date(s)."
- If the user is not a Super User and the Option "Maximum Number of Trips Exceeded" is checked - the Trip will not be submitted and a warning message is displayed. The message will read: "**Warning:** The maximum number of trips has been exceeded for this date. This trip has not been saved."

Account has Insufficient Funds

Allows you to select the action to be taken when the account has insufficient funds.

- Option not checked - the user is warned but allowed to continue entering trip requests

- Option is checked - the user is not allowed to continue entering trip requests

When the user attempts to "Submit" or "Express Trip" a trip and the "account has insufficient funds" the following rules will apply:

- If the user is a Super User, or the System Option "Account has insufficient funds" is not checked, the user will receive a warning when they click "Submit" or "Express Trip". The message will read "**Warning:** the account has Insufficient funds. Click **OK** to continue and submit the trip request. Click **Cancel** to return and allocate additional funds.".
- If the user is not a Super User and the Option "Account has insufficient funds" is checked, the trip will not be submitted and a warning message will display. The message will read "**Warning:** the account has Insufficient funds. This trip has not been saved.

Show all Employees in Requester field

Determines how employees will be displayed when the.

is checked in the Trip Details screen.

- When "Show all Employees in Requester field" is **unchecked**, the expanded list of names in the Trip will contain only active non-transportation employees.
- When "Show all Employees Requester field" is **checked**, the expanded list of names will contain all active transportation and non-transportation employees.

Update Paid Status to Closed

When this option is not checked, payments posted and paid in full (zero balance on the invoice) will have the status set to **Paid**. If this option is checked and the posted payment zeroes out the invoice, the status will automatically be set to **Closed**.

Default Charge Basis

The default values entered will automatically populate the trip estimate screen if the account on the trip does not have a charge basis associated with it.

Note: *You can set up specific charge basis records to apply to specific accounts under System Lists > Charge Basis.*

Hourly Sit Time Rate
Enter the hourly dollar amount for sit time.

Hourly Driving Rate
Enter the hourly dollar amount for driving time.

Overnight Charge
Enter the dollar amount per hour for overnight time.

Distance Rate
Enter the dollar amount per mile.

Weekend Rate
Enter the dollar amount per hour for weekends.

Weekend Begins (day time)
Enter the day and time the weekend begins.

Weekend Ends (day time)
Enter the day and time the weekend ends.

General

Tax Rate
The Tax Rate applies to all Charge Basis and Invoice Charges specified as taxable.

Mapping Convention for distance
You have option of selecting miles or kilometers.

Country
Select either USA or Canada.

System Message
Type a message in the adjoining box and it will be displayed in the VersaTrans TripTracker Today screen.

Enable Password Retrieval

3. In the event that users forget their passwords, they can be retrieved if the user has checked **Enable password retrieval** and then entered the information for password retrieval, see *Starting VersaTrans TripTracker & Setting Up Password Retrieval* on page 4.After you complete these entries, click

to save these options.

Technical Support

If you have any questions concerning VersaTrans TripTracker, call the Technical Support Hotline at 1 (800) 775-5556.

VersaTrans TripTracker Today

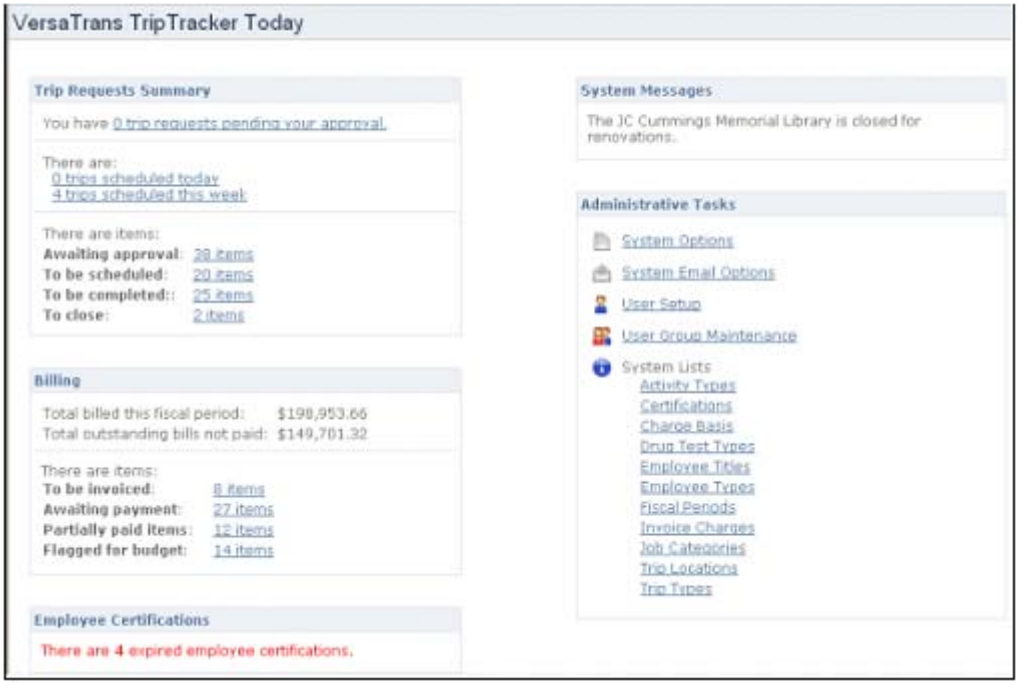
VersaTrans TripTracker Today contains links to trips needing attention (i.e. needing approval, scheduling, etc.) including administrator options. Billing clerks will appreciate VersaTrans TripTracker Today with its special section on trips waiting for payment, invoicing, over budget, etc.

Working In VersaTrans TripTracker Today

When you start VersaTrans TripTracker, the "VersaTrans TripTracker Today" screen displays which acts as the entry/focal point for users. If you need more information on starting TripTracker, see *Starting VersaTrans TripTracker & Setting Up Password Retrieval* on page 4.

Once you have started or are working in VersaTrans TripTracker, you can access TripTracker Today from anywhere within the application by clicking

.



When you logon to VersaTrans TripTracker this is the first screen you will see. It contains information about the five main areas of the application. Each area, except System Messages, has active links to more data within the application. Any text in blue and underlined or in red can be clicked on to move you to more information.

If your user privileges restrict you to particular tasks, only information/links for those tasks will display in the VersaTrans TripTracker Today screen. The above illustration of the VersaTrans TripTracker Today screen comes from a user with Administrator: Super User privileges.

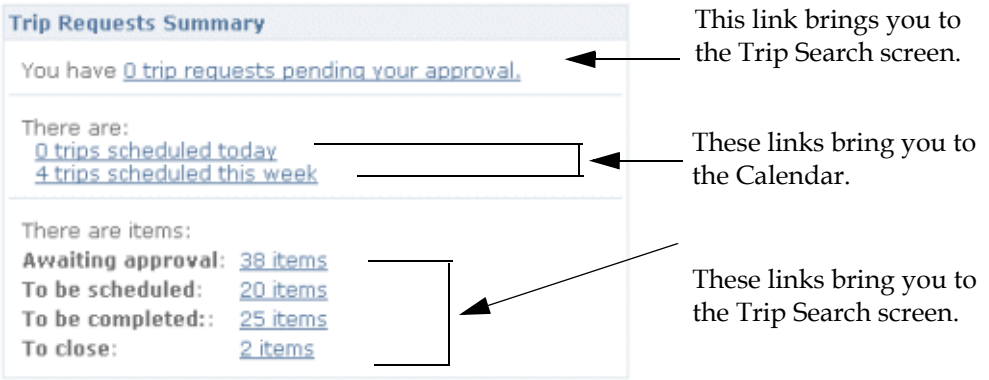
The VersaTrans TripTracker Today screen can consist of six sections:

- Trip Requests Summary

- Billing
- Employee Certifications
- System Messages
- Administrative Tasks

Within these sections are links (i.e. 15 items) that you can click on to access task details and display a screen. (i.e. Calendar, Trip Search, Trip Details Employee, System Options, etc.). These screens allow you to complete the tasks needing your attention. For example, the link description (**To be scheduled**: 15 items) when clicked on will display the Trip Search screen listing all 15 trips that need to be scheduled.

The following illustrations of the five sections of the VersaTrans TripTracker Today screen describe what screens will display when you click on a link and how each screen works. Each section illustrated below describes what links bring you to what screens.


Trip Requests Summary
You have 0 trip requests pending your approval.
There are:
0 trips scheduled today
4 trips scheduled this week
There are items:
Awaiting approval: 38 items
To be scheduled: 20 items
To be completed:: 25 items
To close: 2 items
This link brings you to the Trip Search screen.
These links bring you to the Calendar.
These links bring you to the Trip Search screen.

Trip Search Screen

The Trip Search screen allows you to search for trips. The bottom of the screen displays Trip Request items needing your attention (i.e. needing approval, scheduling, etc.).

Trip ID	Status	Trip Name	Reason For Trip	Account	Trip Date	Requester
204	Paid	Steer Roping		Ambrose Society	10/24/2007	McElroy, E

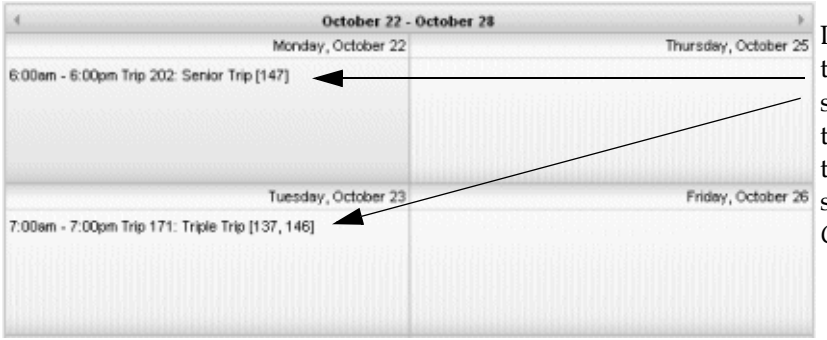
- Clicking on the **Trip Name** will display the Trip Request - Trip Details screen containing tabs for all the stages in the Trip Request process.
- You can select the stage/tab for the task that you need to work with.

Trip Details | Trip Estimate | Directions | Scheduling | Completion | Invoicing | Payment | Trip History

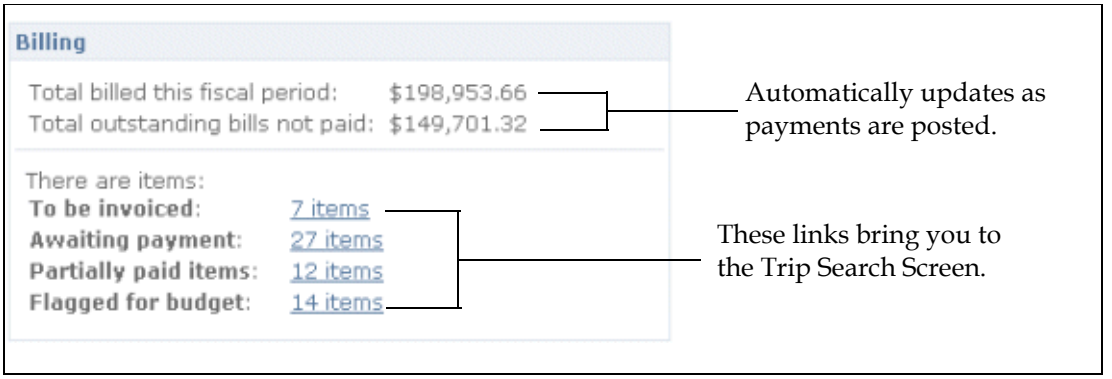
For information on working with each of these stages, see, *Requesting a Trip* on page 175).

Calendar

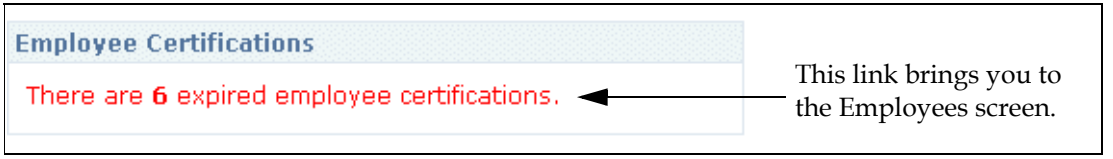
In VersaTrans TripTracker Today, there are links (see the Trip Request Summary illustration) that bring you to the calendar displaying trips that have been scheduled. The scheduled trips can be for the current day or for the current week.


October 22 - October 28
Monday, October 22
Thursday, October 25
6:00am - 6:00pm Trip 202: Senior Trip [147]
Tuesday, October 23
Friday, October 26
7:00am - 7:00pm Trip 171: Triple Trip [137, 146]

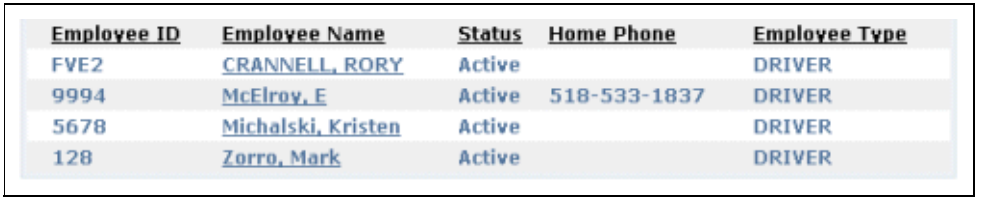
Double-click on a trip to go to the Trip Request screen and work through the different stages for that trip. For more information, see *VersaTrans TripTracker Calendar*.


Billing
Total billed this fiscal period: $198,953.66
Total outstanding bills not paid: $149,701.32
There are items:
To be invoiced: 7 items
Awaiting payment: 27 items
Partially paid items: 12 items
Flagged for budget: 14 items
Automatically updates as payments are posted.
These links bring you to the Trip Search Screen.

This screen allows you to work through the different stages of the Trip Request process. The bottom of the screen displays the billing items needing your attention (i.e. To be invoiced, Awaiting Payment, etc.).



Employees with expired certifications needing your attention are displayed at the bottom of the Employee screen.

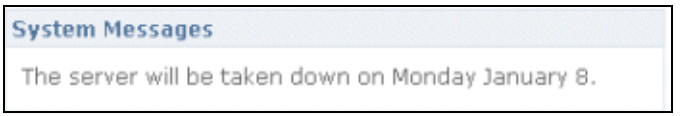


Employee ID	Employee Name	Status	Home Phone	Employee Type
FVE2	CRANNELL, RORY	Active		DRIVER
9994	McElroy, E	Active	518-533-1837	DRIVER
5678	Michalski, Kristen	Active		DRIVER
128	Zorro, Mark	Active		DRIVER

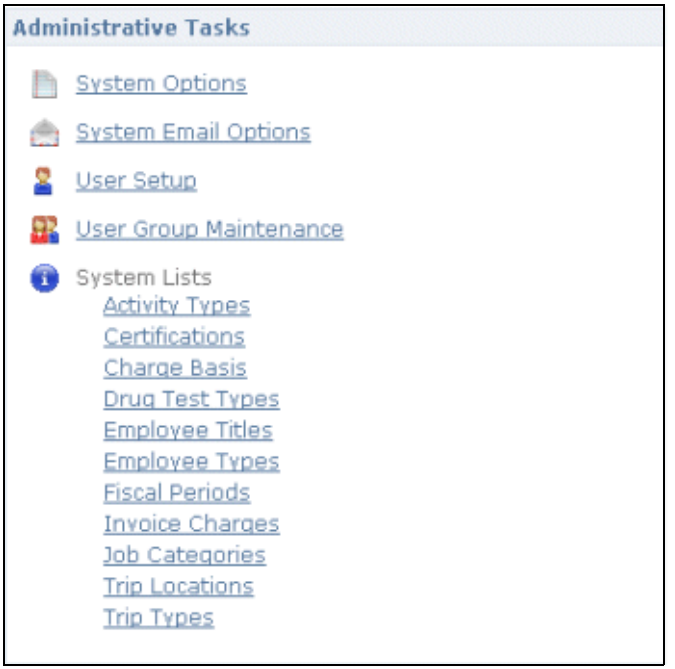
- Clicking on an employee's name displays that employee's record.

- Clicking the Certifications tab displays the Certifications panel.

When new certification are added (see, *Setting Up Certification Records* on page 111) a number of look ahead days are entered. If the number of look ahead days has passed, the Status column entry reads *Overdue* and the system highlights the entry in red. When you update/edit the certification entries for the employee, the red highlight disappears. For more information, see *Viewing & Updating an Employee's Certification Information* on page 144.



A customized system message can be displayed in the VersaTrans TripTracker System Messages panel. This feature is described in *Setting the System Options* on page 9.



The Administrative Tasks links bring you directly to screens that allow you to work with various tasks. For example, clicking System Options brings you to the Systems Options screen where you can specify system options.

- For information on System Options, User Setup, and User Group Maintenance, see *Backing Up, Restoring & Importing Data* on page 261.
- For information on System Emai Options, see *Setting Up Security & Email* on page 235.
- For information on working with System Lists, see *Working with the Records* on page 35.

VersaTrans TripTracker Calendar

The VersaTrans TripTracker calendar allows users with the appropriate privileges to select a trip from the calendar and go directly to the Trip Request screen where you can work through the trip request process for that trip. You can also initiate a trip request directly from the calendar, filter which trips you'd like to view, change the calendar view to day, week, or month and print a Trip Listing Detail report from the calendar.

The following topics are covered in this section:

- *Selecting and Working with Trips from the Calendar, 25*
- *Initiating a Trip Request from the Calendar, 28*
- *Filtering Trips and Printing a Trip List Report from the Calendar, 29*
- *Changing the Calendar View, 31*
- *Adding, Editing & Deleting Calendar Notes, 32*

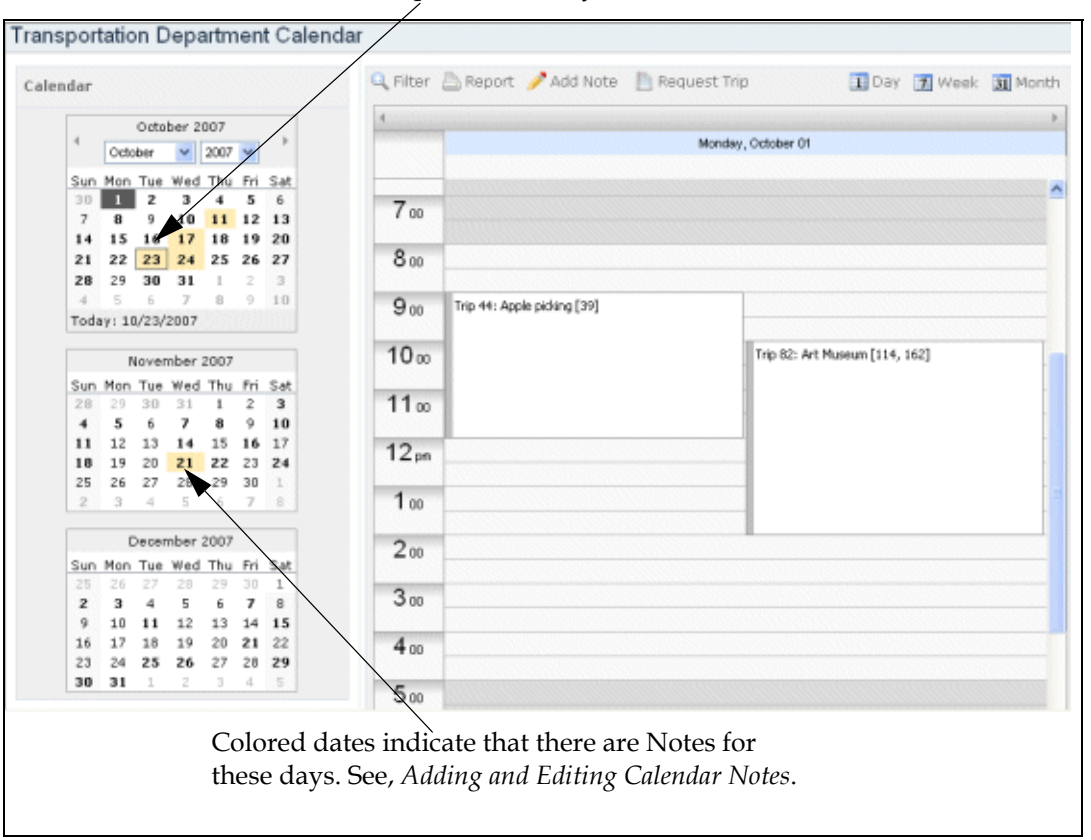
Selecting and Working with Trips from the Calendar

The calendar has a three month calendar view and displays the current month and two future months. When you go into the calendar it brings you to the current day on the calendar.

1. You can access the Calendar from anywhere within the application by clicking

.

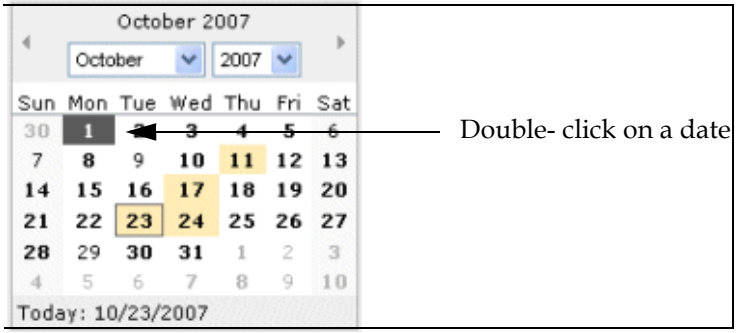
A date with a bold outline indicates that there are trips on these days.

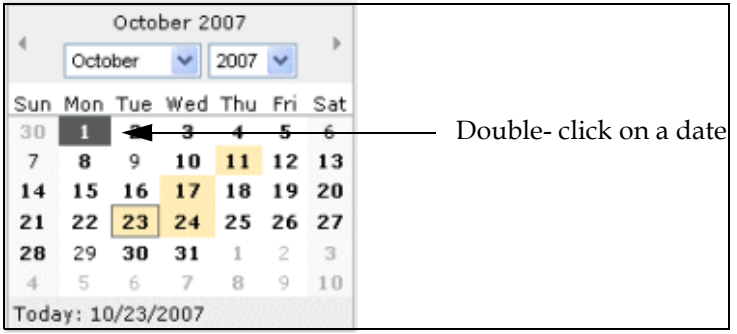


Colored dates indicate that there are Notes for these days. See, *Adding and Editing Calendar Notes*.

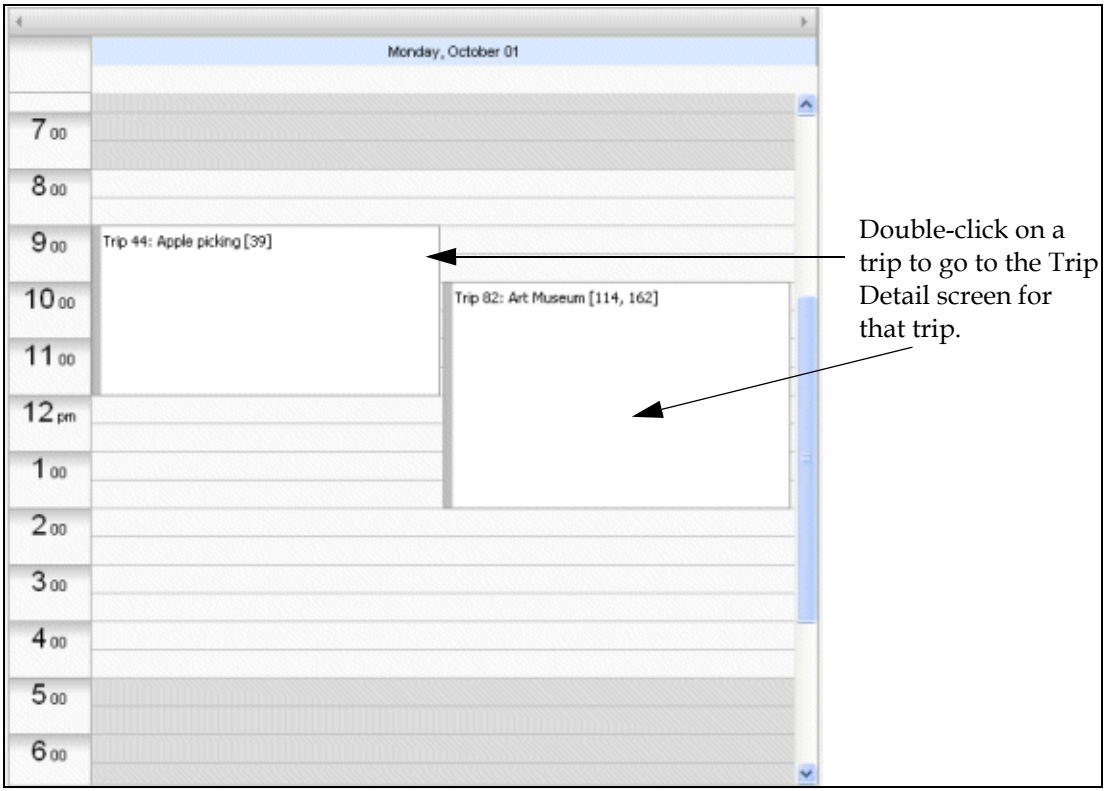
2. You can move forward or backward a month at a time by clicking the arrows in the three month calendar panel.

3. The highlighted dates represent dates that contain trips. Double-click on a highlighted date in the three month calendar to view applicable trips and/or school closings for that date.





In this case, we selected Monday, October 1, 2007 and the trips with that start date are displayed. The beginning and ending times for the trips are also displayed.



4. Double-click on a trip to go to the Trip Detail screen for that trip.

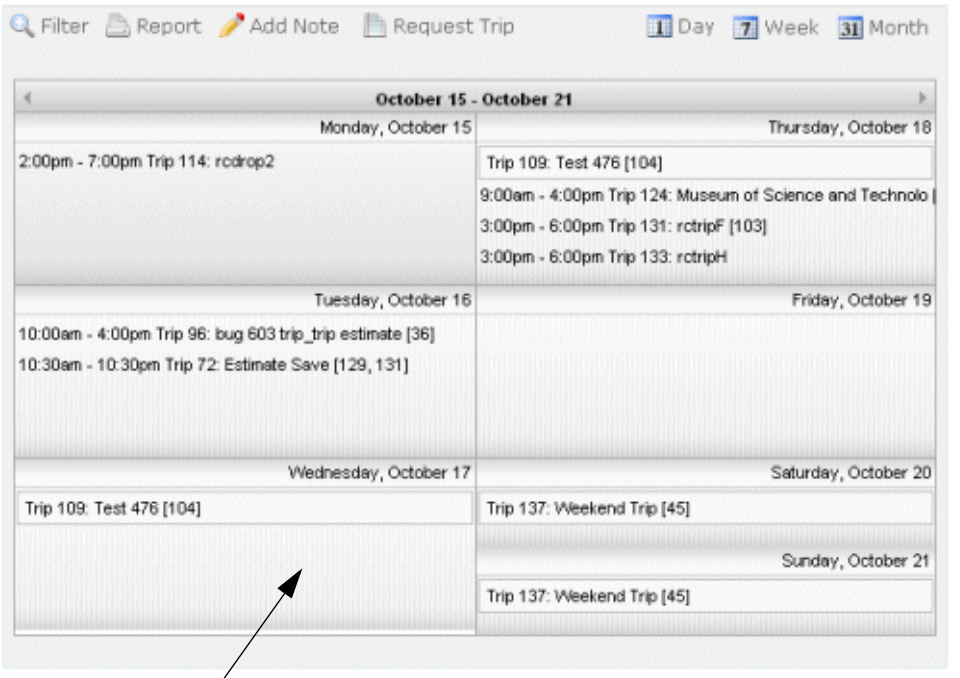
   You can view the details for that trip and perform different trip request tasks. See, *Working with Trip Requests* on page 169.

Initiating a Trip Request from the Calendar

Users assigned request permissions can request a trip by selecting a day from the weekly or monthly calendar or the time of day from the daily calendar view. Selecting a day or time will auto populate the trip data field and departure time field.

- You can access the Calendar from anywhere within the application by clicking

.


Filter
Report
Add Note
Request Trip
Day
Week
Month
October 15 - October 21
Monday, October 15
2:00pm - 7:00pm Trip 114: rcdrop2
Thursday, October 18
Trip 109: Test 476 [104]
9:00am - 4:00pm Trip 124: Museum of Science and Technolo
3:00pm - 6:00pm Trip 131: rctripF [103]
3:00pm - 6:00pm Trip 133: rctripH
Tuesday, October 16
10:00am - 4:00pm Trip 96: bug 603 trip_trip estimate [36]
10:30am - 10:30pm Trip 72: Estimate Save [129, 131]
Friday, October 19
Wednesday, October 17
Trip 109: Test 476 [104]
Saturday, October 20
Trip 137: Weekend Trip [45]
Sunday, October 21
Trip 137: Weekend Trip [45]

Double- click on a day in the calendar to initiate a trip request

For more information on working with trip requests, see *Working with Trip Requests* on page 169.

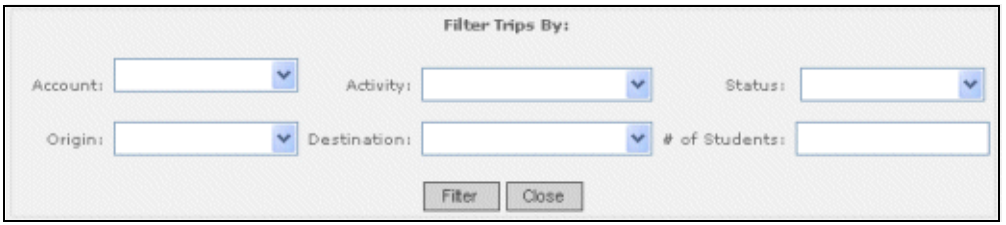
Filtering Trips and Printing a Trip List Report from the Calendar

You can filter viewed trips by account, activity, status, origin, destination, and number of students. A filter can be run in any calendar view and will filter on all the trips associated with that view. A Trip List Detail report can be generated from the results of the filter. This is particularly useful for districts who have many trips (50-100) in one day and they want to limit the trips viewed on the calendar. Once a filter is run, a Trip List report can be generated for all currently viewed trips

1. You can access the Calendar from anywhere within the application by clicking

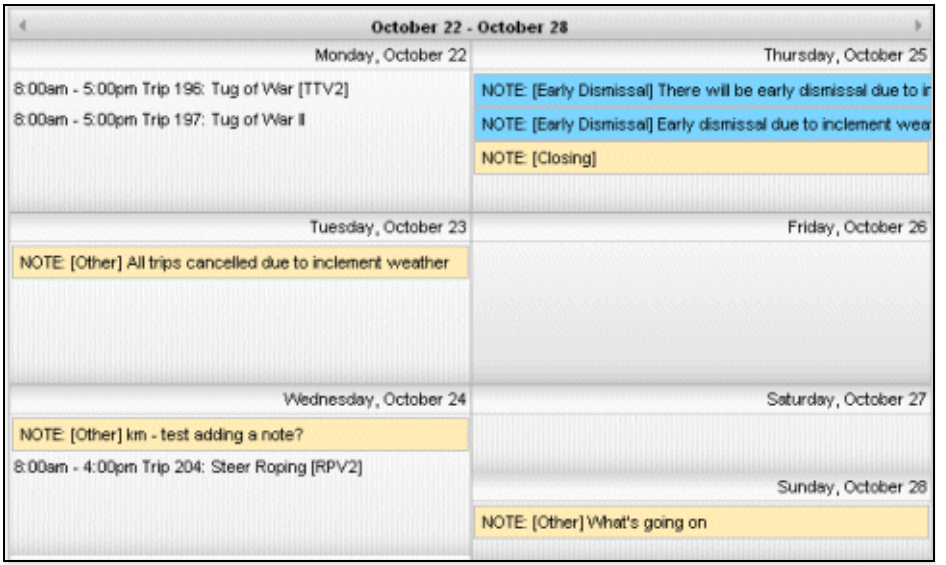
.
2. Click

to display the Filter Trips By panel.

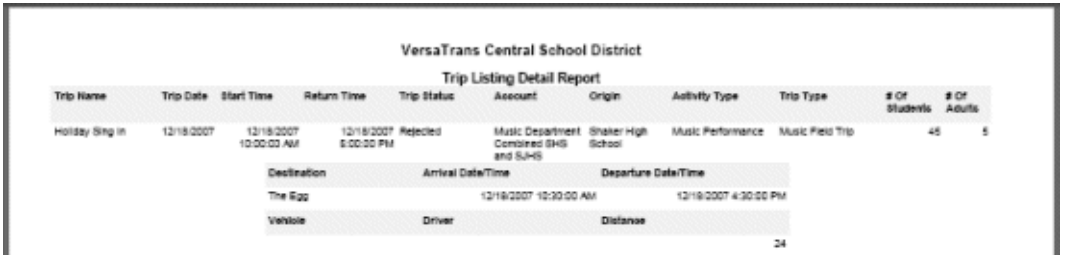


3. Click and select the Account that you want to filter on or add to the filter criteria.
4. Click and select the Activity that you want to filter on or add to the filter criteria.
5. Click and select a Status (Requested, Approved, Scheduled, Driver Refused, Completed, Awaiting Payment, Partial Payment, Paid, or Closed) that you want to filter on or add to the filter criteria.
6. Click and select the Origin that you want to filter on or add to the filter criteria.
7. Click and select the Destination that you want to filter on or add to the filter criteria.

8. Enter the # of Students that you want to filter on or add to the filter criteria.
9. Click Filter to run the filter on the criteria that you selected. The calendar displays the filter results on the calendar.


October 22 - October 28
Monday, October 22
8:00am - 5:00pm Trip 196: Tug of War [TTV2]
8:00am - 5:00pm Trip 197: Tug of War II
Thursday, October 25
NOTE: [Early Dismissal] There will be early dismissal due to ir
NOTE: [Early Dismissal] Early dismissal due to inclement wea
NOTE: [Closing]
Tuesday, October 23
NOTE: [Other] All trips cancelled due to inclement weather
Friday, October 26
Wednesday, October 24
NOTE: [Other] km - test adding a note?
8:00am - 4:00pm Trip 204: Steer Roping [RPV2]
Saturday, October 27
Sunday, October 28
NOTE: [Other] What's going on

Click Report to generate a Trip List Report from the results of the filter.



10. The Trip Listing Detail report shows the details of each trip.

11. Click to send the report to your printer.
12. Click and save the report in PDF format.

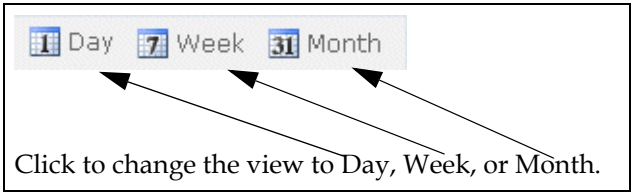
Changing the Calendar View

Yo can change the calendar view to day, week, or month.

1. You can access the Calendar from anywhere within the application by clicking

.
2. You can move forward or backward a month at a time by clicking the arrows in the three month calendar panel.

3. Once you have moved to the desired month, click Day, Week, or Month to change the view.



If there are trips or notes for the selected day, week, or month view, they display on the calendar.

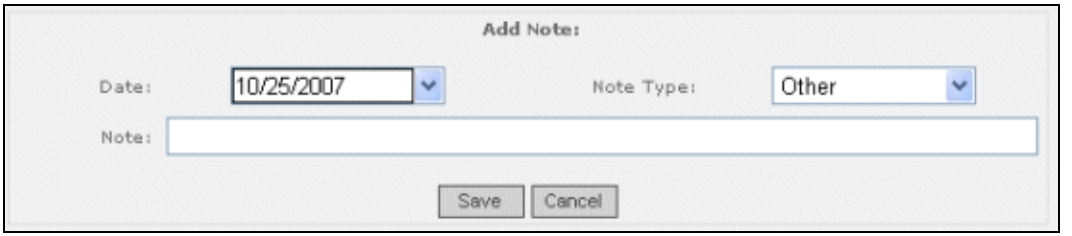
Adding, Editing & Deleting Calendar Notes

Users with appropriate permissions can use Notes to add holidays, as well as school/client/department closings (vacations and holidays) and early dismissals to any day on the calendar. Notes can be added in any view (Day, Week or Month) and will display in all views regardless of the view it was created in.

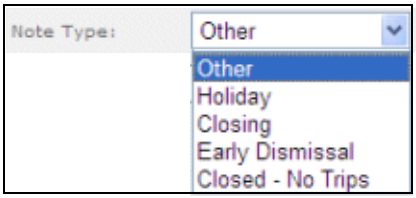
1. You can access the Calendar from anywhere within the application by clicking

.
2. Click

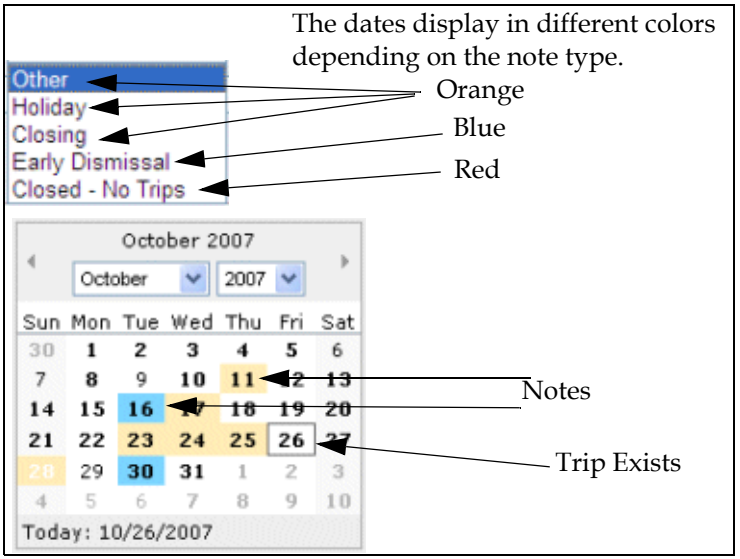
to display the Add Note panel.



3. Defaults to the current date. Click to select a date other than the default. The note will be added to the date selected.



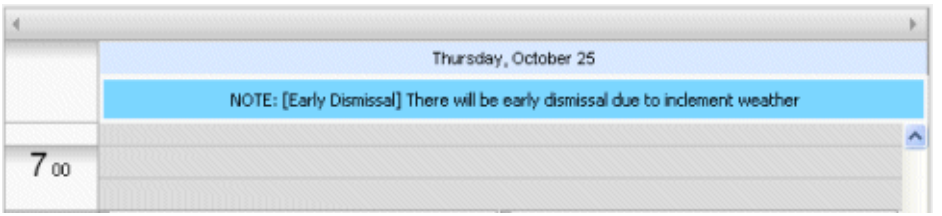
4. There are five categories of notes that you can select from: Other (default), Holiday, Closing, Early Dismissal and Closed - No Trips. The note type you select is appended to the note (i.e. NOTE: [Early Dismissal]).
5. Click to select a Note Type other than the default.



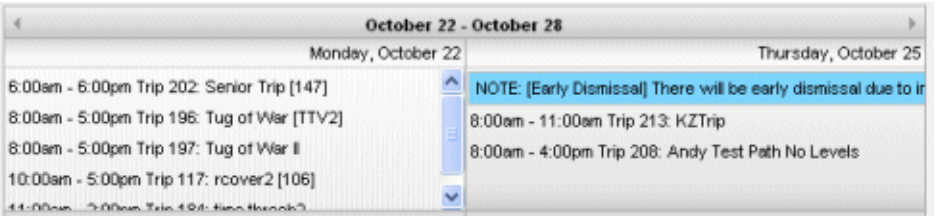
6. Enter the text for the note in the Note field.

7. When you are finished, click Save. The note is saved and displays in all of the Calendar views.

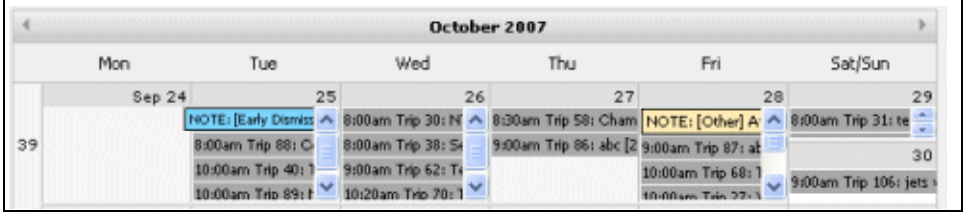
Day View



Week View


October 22 - October 28
Monday, October 22
Thursday, October 25
6:00am - 6:00pm Trip 202: Senior Trip [147]
8:00am - 5:00pm Trip 196: Tug of War [TTV2]
8:00am - 5:00pm Trip 197: Tug of War II
10:00am - 5:00pm Trip 117: rcover2 [106]
NOTE: [Early Dismissal] There will be early dismissal due to ir
8:00am - 11:00am Trip 213: KZTrip
8:00am - 4:00pm Trip 208: Andy Test Path No Levels

Month View



8. To edit or delete a note, double-click on the note in the Calendar to display the Edit Notes panel.
9. To edit the note, enter changes to the note in the Note field and click Save.
10. To delete the note, click Delete.

Chapter 2

Working with the Records

Topics In This Chapter:

VersaTrans TripTracker System Overview, 36
Setting Up Building Records, 38
Setting Up the Financial Records, 45
Setting Up Accounts, 64
Setting Up Trip Locations, 79
Setting Up Trip Types, 86
Setting Up Vehicle Records, 97
Setting Up Employee Records, 110
Setting Up Approval Paths, 162

VersaTrans TripTracker System Overview

Congratulations! You are ready to set up the records for the VersaTrans TripTracker system. With VersaTrans TripTracker, you can use as little or as much of the system as you want.

You can use the Trip Request screens to request, estimate, schedule, invoice, and record field trip payments.

Why Do I Have To Fill In These Records?

The VersaTrans TripTracker system processes the daily trip tracking work you do. The more information you fill into the records, the more the system can do for you as you enter field trips later. So it will be easier if you enter the repetitive data once, before you begin.

What Do I Enter First?

We recommend that you enter information in the order listed in Related Topics. The data you need to enter depends upon how you want to use the system.

- *Setting the System Options* on page 9
- *Setting Up Email* on page 251
- *Setting Up Building Records* on page 38
- *Setting Up the Financial Records* on page 45
- *Setting Up Trip Locations* on page 79
- *Setting Up Trip Types* on page 86
- *Setting Up Employee Records* on page 110
- *Adding an Employee Record* on page 139
- *Setting Up Approval Paths* on page 162
- *Setting Up Accounts* on page 64
- *Specifying Driver Assignment Rules & Creating a Template* on page 156
- *Adding a Vehicle Record* on page 97
- *Setting Up User Groups & Users* on page 236

Setting Up Building Records

If you are currently working with VersaTrans RP, you have probably set up most of the building records for VersaTrans TripTracker. Buildings can either be entered manually or imported into VersaTrans TripTracker. See, *Using the Import Utility* on page 267.

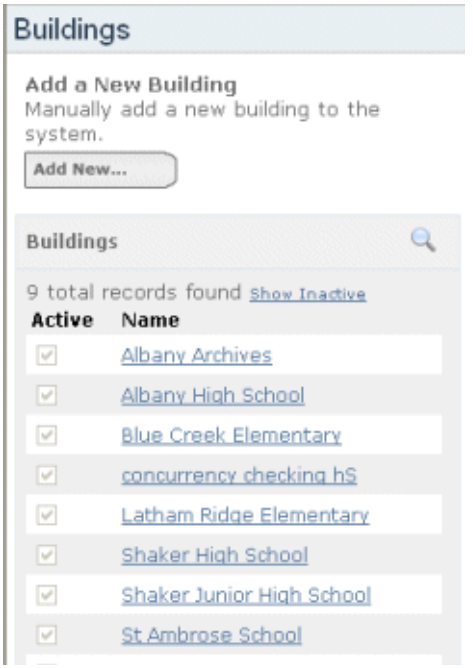
Manually Adding a Building Record

You need to enter a record for each building that is part of your district. The Bus garage and all the schools plus any other facilities that would constitute a point of origin must be entered.

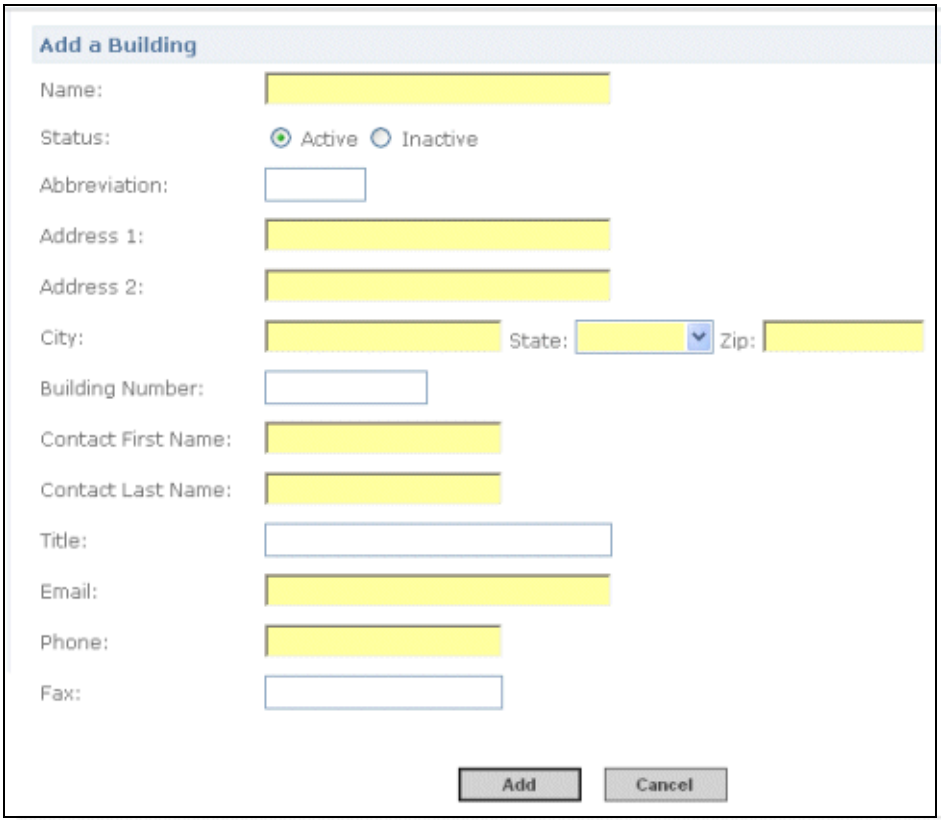
To manually add a building record:

Path:) **Admin > Building**

1. Follow the above path to display the Buildings screen.



2. Click Add New... .



3. Complete the fields in this screen. Most of the fields are self explanatory.

   Building Number (required)
   Enter a build number to identify a building.

4. When you have completed these entries, click Add to save the new record.
5. You can continue adding new records by clicking Add New... .

Editing a Building Record

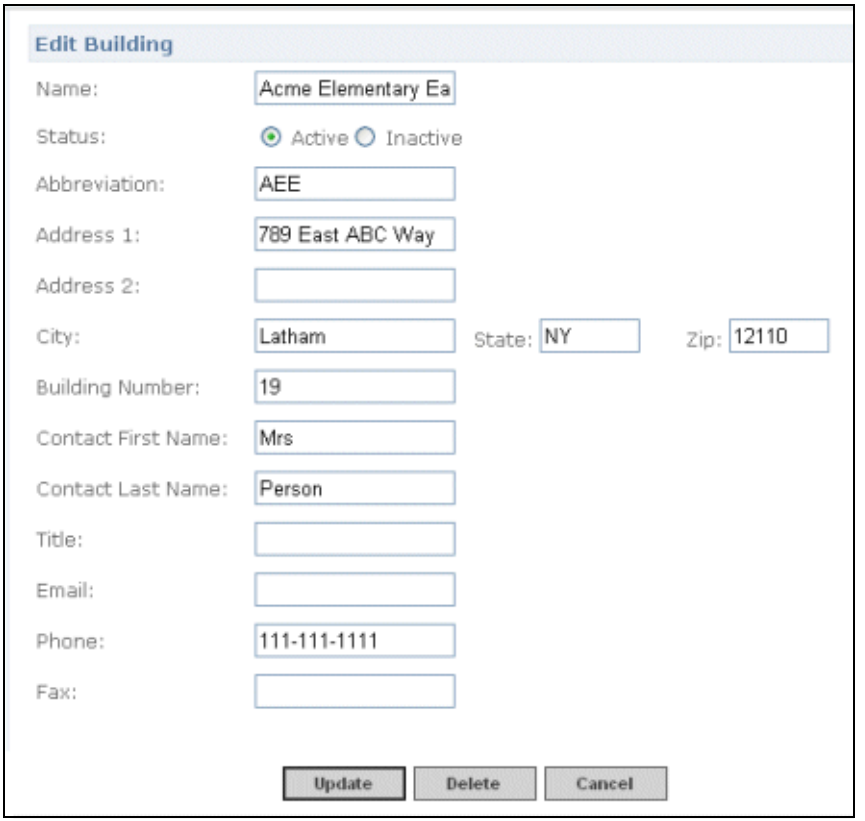
To edit a building record:

Path:) Admin > Buildings

1. In the Buildings screen, click to display the blank search panel.

2. Start typing the name of the building. As you enter text, the system will display a list of buildings that comes closest to matching the text entered.

3. Click on the building to select it and display the edit building screen.



4. Place your cursor in the field you want to change the entry for and type over the existing entry.
5. After you complete your changes, click **Update** to save your changes.

Deleting a Building Record

To delete a building record:

Path:) **Admin > Buildings**

1. In the Buildings screen, click to display the blank search panel.

2. Start typing the name of the building. As you enter text, the system will display a list of buildings that comes closest to matching the text entered.
3. Click on the Building's name to display the Edit Building screen.
4. Click .

5. Click **OK** to delete the building record. The record is deleted and it's name is removed from the Active Name list.

Showing Inactive Buildings in the Building List

Only the "active" buildings display in the building list. You have the option of displaying the "Active" and "Inactive" buildings in the building list.

To show active and inactive buildings in the building list:

Path:) **Admin > Buildings**

- Click Show Inactive in the Buildings screen to show the active and inactive buildings.

Setting Up the Financial Records

If your organization uses financial accounts for field trips, you can enter this account information. For the best results, set up your account records in this order:

- *Charge Basis Records* - The formula the system uses to calculate trip costs
- *Invoice Charge Records* - Additional charges that may apply to an account
- *Fiscal Period Records* - Fiscal year date range settings

Setting Up the Charge Basis Records

By setting the charge basis, you customize the rules that VersaTrans TripTracker uses to determine the cost of the field trip. For example, you might develop a charge basis for team trips (by mileage) and a separate charge basis for local class trips (fixed fee). You can create the charge basis here and assign it to one or more accounts.

Adding a Charge Basis

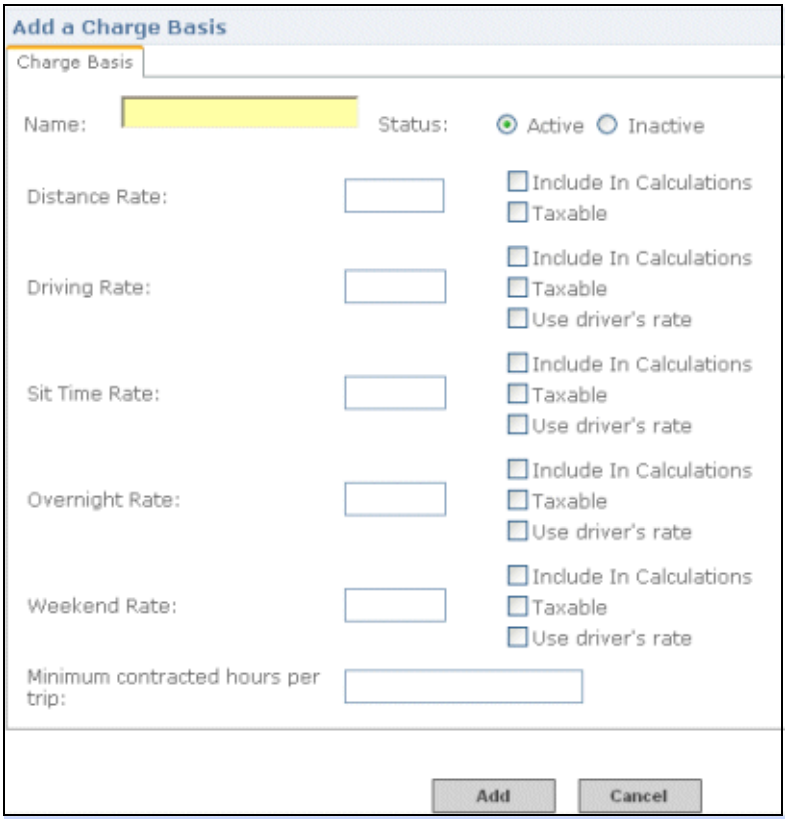
You add a charge basis to set the formula(s) VersaTrans TripTracker should use to derive the cost of the field trip.

To add a charge basis:

Path:) Admin > System Lists > Charge Basis

1. Follow the above path to display the System List: Charge Basis screen.

2. Click Add New... to display a blank record



3. Enter the name of the charge basis in the **NAME** field.

4. Select **ACTIVE** for the status. A charge basis which have been checked as Active will appear for selection in drop-down lists in the account record.

5. Enter the default rates or where applicable check **USE DRIVER'S RATE.** You can either choose to calculate the driver time using the individual driver's rate as entered in the driver's employee file, or you can enter default driver rates. You can mix the default rates and driver-specific rates if you wish.

Distance Rate
Enter the rate per mile/kilometer that will be used in the calculation of the vehicle distance cost for the field trip.

Driving Rate
Allows you to enter a default driving rate for all drivers. Enter the dollar amount per hour that will be used in the calculation of the driver cost for the field trip.

Sit Time Rate
Allows you to enter a default sit rate for all drivers. Enter the dollar amount per hour that will be used in the calculation of the driver sit time cost for the field trip.

Overnight Rate
Enter the dollar amount per hour that will be used in the calculation of the driver overnight cost for the field trip

Weekend Rate
Enter the dollar amount per hour that will be used in the calculation of the driver weekend cost for the field trip.

6. Check **INCLUDE IN CALCULATIONS** to have the default rate included when calculating the charge basis and leave unchecked to have it not included.
7. Check **TAXABLE** if the invoice charge is taxable and leave unchecked if it is not. The tax rate specified in the administrative system settings is used for calculations.
8. If applicable, enter the **MINIMUN CONTRACTED HOURS PER TRIP** (the guaranteed minimum number of hours per any given trip).
9. Click

to add the new charge basis. The new charge basis displays in the Systems List: Charge Basis screen.

Entering, Editing and Removing Fixed Charges

A charges basis must first exist before you can enter, edit or remove fixed charges assigned to a charge basis. See, *Adding a Charge Basis* on page 45.

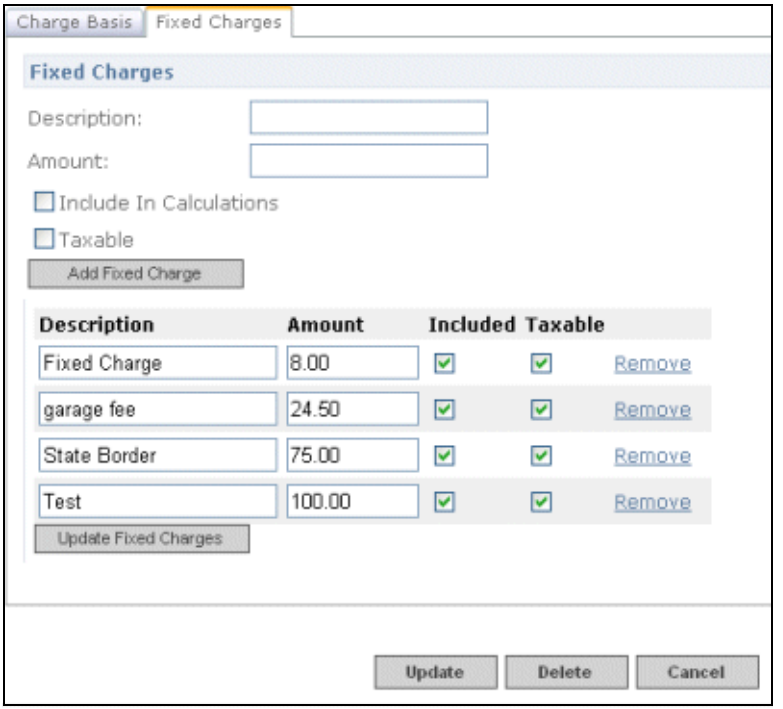
To enter, edit, or remove fixed charges:

Path:) **Admin > System Lists > Charge Basis**

1. In the System List: Charge Basis screen, click to display the blank search panel.

2. Start typing the name of the charge basis. As you enter text, the system will display a list of charges that comes closest to matching the text entered.
3. Select a charge basis to display the Edit Charge Basis screen.

4. Click Fixed Charges to display the Fixed Charges screen.



5. Enter a description of the fixed charge in the **DESCRIPTION** field.
6. Enter the amount of the fixed charge in the **AMOUNT** field.
7. Click Add Fixed Charge to add the charge to the list of fixed charges.
8. Check **INCLUDE IN CALCULATIONS** to have the fixed charge included when calculating the charge basis and leave unchecked to have it not included.
9. Check **TAXABLE** if the fixed charge is taxable and leave unchecked if it is not. The tax rate specified in the administrative system settings is used for calculations.
10. Clicking **REMOVE** in the same row as a fixed charge deletes that charge.

11. You can make changes to the fixed charge descriptions and/or amounts by typing over the entries in the applicable fields.
12. Click Update Fixed Charges to add the new or changed fixed charges to the charge basis.

Editing a Charge Basis

If your organization changes the way it charges for field trips, you can easily make changes to the existing charge basis.

> ***Note:*** *The changes you make to the charge basis calculation are only evident when you generate the invoice.*

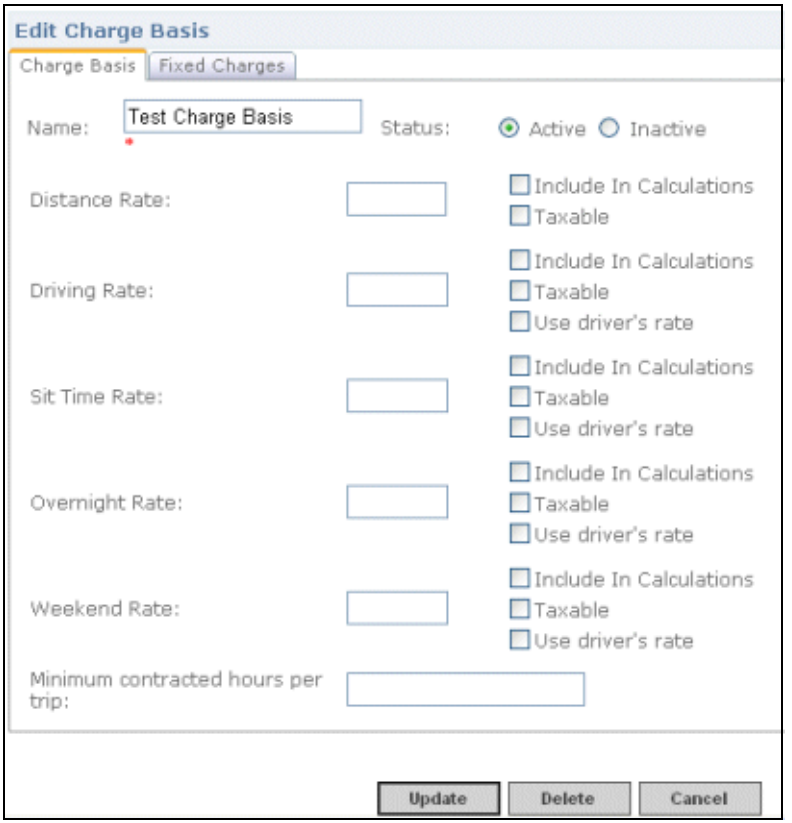
To edit a charge basis:

Path:) **Admin > System Lists > Charge Basis**

1. In the System List: Charge Basis screen, click to display the blank search panel.

2. Start typing the name of the charge basis. As you enter text, the system will display a list of charges that comes closest to matching the text entered.

3. Select a charge basis to display the Edit Charge Basis screen.



4. Type over the fields you want to change and check the associated checkbox if applicable.

Distance Rate
Enter the rate per mile/kilometer that will be used in the calculation of the vehicle distance cost for the field trip.

Driving Rate
Allows you to enter a default driving rate for all drivers. Enter the dollar amount per hour that will be used in the calculation of the driver cost for the field trip.

Sit Time Rate
Allows you to enter a default sit rate for all drivers. Enter the dollar amount per hour that will be used in the calculation of the driver sit time cost for the field trip.

Overnight Rate
Enter the dollar amount per hour that will be used in the calculation of the driver overnight cost for the field trip

Weekend Rate
Enter the dollar amount per hour that will be used in the calculation of the driver weekend cost for the field trip.

5. After you complete your changes, click Update to save your changes.

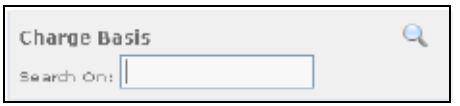
Deactivating a Charge Basis

We do not recommend that you delete a charge basis, but you can do so. We recommend you make it inactive so it doesn't display as an option in the future.

To deactivate a charge basis:

Path:) Admin > System Lists > Charge Basis

1. In the System List: Charge Basis screen, click to display the blank search panel.



2. Start typing the name of the charge basis. As you enter text, the system will display a list of charges that comes closest to matching the text entered.
3. Select a charge basis to display the Edit Charge Basis screen.
4. Click in the Status field.
5. Click to save your changes.

Setting the Default Charge Basis

You can set a default charge basis in the Accounts screen if you have permission to edit it. See *Setting Up Accounts* on page 64 for more information.

Setting Up the Invoice Charges

Your organization may use invoice charges to add additional field trip charges. Invoice Charges are a way to capture costs associates with a trip that are not directly related to a drivers pay or the operating costs of a vehicle. They may include things like cleaning of a vehicle or administrative tasks. You can use the taxable field to keep track of taxes. Invoice charges are not required, so you do not have to add them.

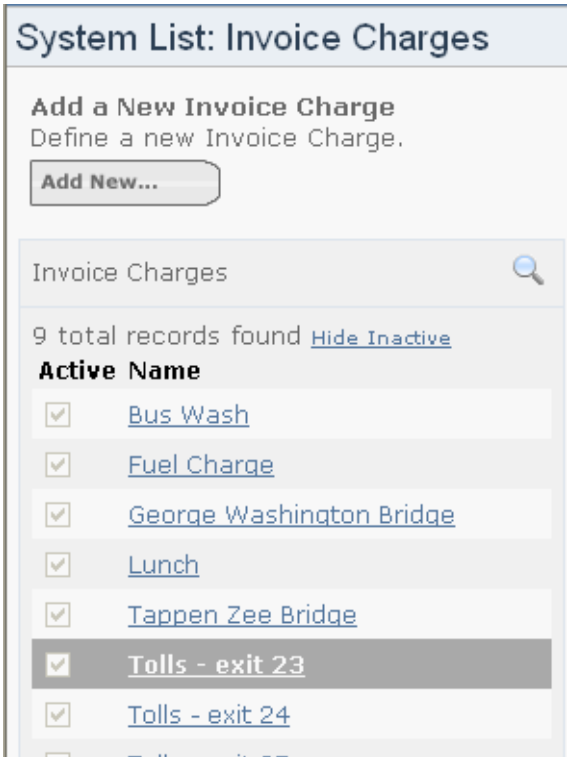
Note: *Unlike fixed costs that are automatically entered on every trip associated with a particular* ***Charge Basis****,* ***Invoice Charges*** *can be added for any trip as needed to recover costs associated with the trip.*

Adding an Invoice Charge

To add an Invoice Charge:

Path:) **Admin > System Lists > Invoice Charges**

1. Follow the above path to display the System List: Invoice Charges screen.



2. Click to display a blank record.

3. Enter the name of the invoice charge in the Name field.

4. Enter the price of the invoice charge in the Price field.

   Select **ACTIVE** for the status. Invoice charges which have been checked as Active will appear for selection in drop-down lists throughout the application.

5. Select **YES** if the invoice charge is taxable and **NO** if it is not. The tax rate specified in the administrative system settings is used for calculations.

6. Click Add to add the new invoice charge. The new invoice charge appears on the Invoice Charges list.

Editing an Invoice Charge

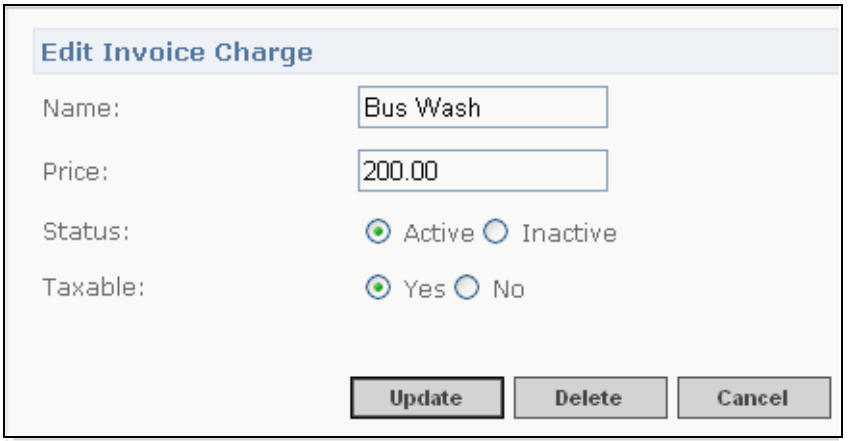
To edit an invoice charge:

Path:) Admin > System Lists > Invoice Charges

1. In the System List: Invoice Charges screen, click to display the blank search panel.

2. Start typing the name of the invoice charge. As you enter text, the system will display a list of charges that comes closest to matching the text entered.

3. Select an invoice charge to display the Edit Invoice Charge screen.



4. You can change the name and status of the invoice charge.
5. You can change whether or not the invoice charge is taxable by selecting **YES** or **NO** in the status field.
6. After you complete your changes, click **Update** to save your changes.

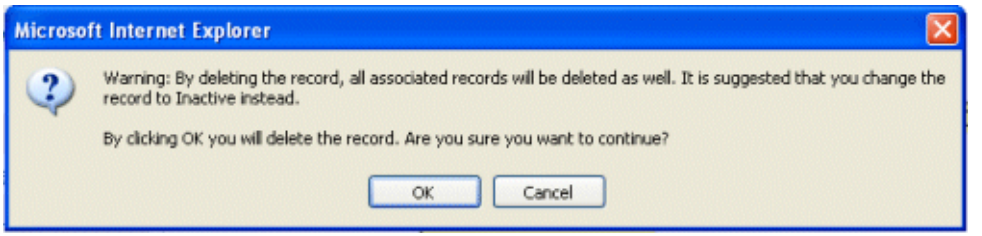
Deleting an Invoice Charge

To delete an invoice charge:

Path:) **Admin > System Lists > Invoice Charges**

1. In the System List: Invoice Charges screen, click to display the blank search panel.

2. Start typing the name of the invoice charge. As you enter text, the system will display a list of charges that comes closest to matching the text entered.
3. Select an invoice charge to display the Edit Invoice Charge screen.
4. Click **Delete**.


Microsoft Internet Explorer
Warning: By deleting the record, all associated records will be deleted as well. It is suggested that you change the record to Inactive instead.
By clicking OK you will delete the record. Are you sure you want to continue?
OK
Cancel

5. Click **OK** to delete the invoice charge record. The record is deleted and it's name is removed from the Invoice Charge list.

Deactivating an Invoice Charge

To deactivate an invoice charge:

Path:) **Admin > System Lists > Invoice Charges**

1. In the System List: Invoice Charges screen, click to display the blank search panel.

2. Start typing the name of the invoice charge. As you enter text, the system will display a list of charges that comes closest to matching the text entered.
3. Select an invoice charge to display the Edit Invoice Charge screen.
4. Click in the Status field.
5. Click to save your changes.

Showing Inactive Invoice Charge Records in the Invoice Charges List

Only the "active" invoice charge records display in the invoice charge list. You have the option of displaying the "Active" and "Inactive" invoice charge records in the invoice charge list.

To show active and inactive invoice charge records in the invoice charges list:

Path:) Admin > System Lists > Invoice Charges

- Click in the Invoice Charges screen to show the active and inactive records.

Setting Up the Fiscal Periods

Fiscal Periods, or budget periods, are blocks of time that a fixed amount of money for trips has been allocated for. It could be by quarter or annually or

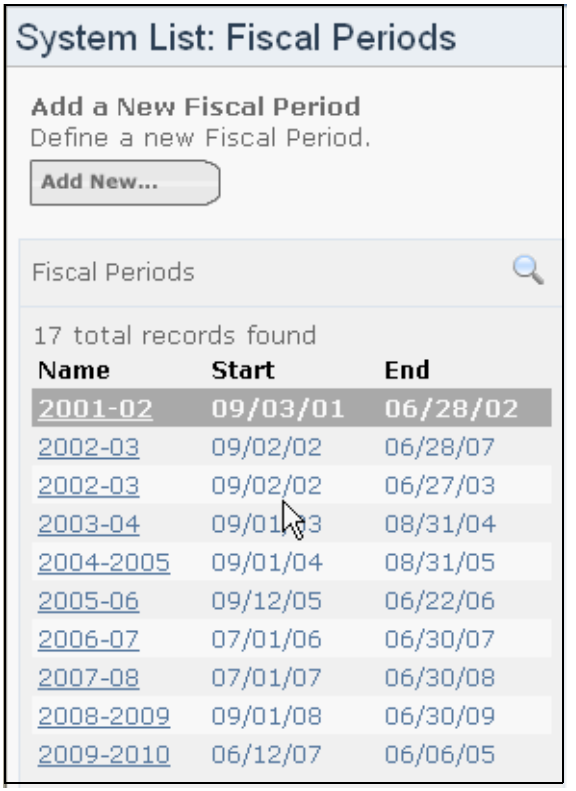
any other method used in your district.

Adding a Fiscal Period

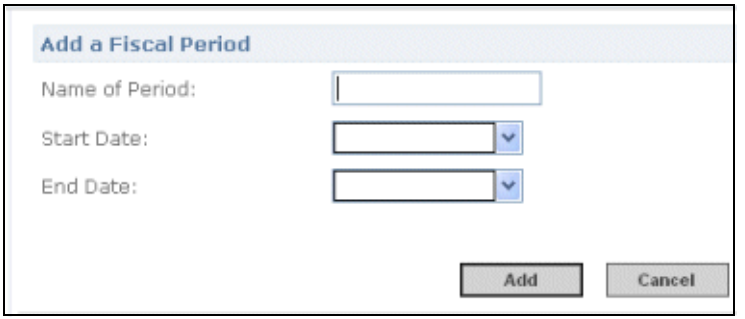
To add a Fiscal Period:

Path:) **Admin > System Lists > Fiscal Periods**

1. Follow the above path to display the System List: Fiscal Periods screen.



2. Click Add New... to display a blank record.



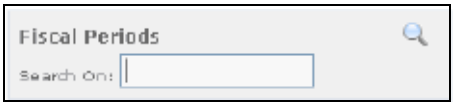
3. Enter a name for the fiscal period.
4. Enter a start and end date or use the drop-down buttons to select dates from a calendar.
5. When you have completed these entries, click Add to save the new record.
6. You can continue adding new records by clicking Add New....

Editing a Fiscal Period

To edit a fiscal period:

Path:) Admin > System Lists > Fiscal Periods

1. In the System List: Fiscal Periods screen, click to display the blank search panel.



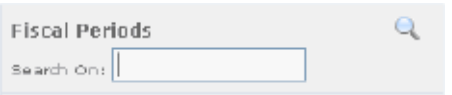
2. Start typing the name of the fiscal period. As you enter text, the system will display a list of charges that comes closest to matching the text entered.
3. Select a fiscal period to display the Edit Fiscal Period screen.
4. Place your cursor in the field you want to change the entry for and type over the existing entry. You have the option of selecting dates from a calendar in the Start and End Date fields.
5. After you complete your changes, click Update to save your changes.

Deleting a Fiscal Period

To delete a fiscal period:

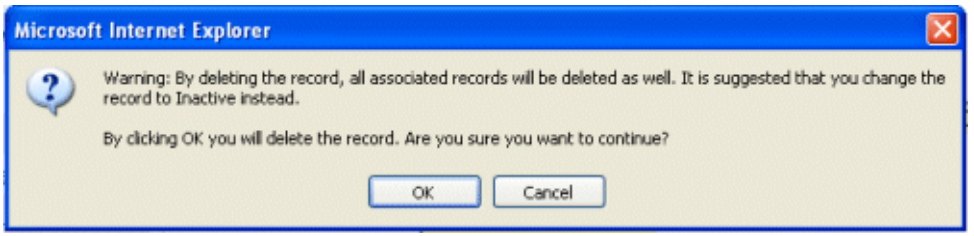
Path:) Admin > System Lists > Fiscal Periods

1. In the System List: Fiscal Periods screen, click to display the blank search panel.



2. Start typing the name of the fiscal period. As you enter text, the system will display a list of charges that comes closest to matching the text entered.
3. Select a fiscal period to display the Edit Fiscal Period screen.

4. Click Delete.


Microsoft Internet Explorer
Warning: By deleting the record, all associated records will be deleted as well. It is suggested that you change the record to Inactive instead.
By clicking OK you will delete the record. Are you sure you want to continue?
OK
Cancel

5. Click **OK** to delete the fiscal period record. The record is deleted and its name is removed from the Fiscal Periods list.

Setting Up Accounts

Once you have completed the building records, the charge basis, the invoice charges (if applicable), and the fiscal period, you are ready to set up the accounts.

Accounts contain certain information required for requesting field trips. They allow the transportation department to identify a school, district, program or other entity and obtain contact person and contact method information on that entity, identify what types of charge basis apply globally to the entity, set a budget threshold for the entity, and identify who can approve requests for the entity.

An entity could be a school or could be a division within the school (performing arts, language, ROTC, athletic department). Within the division, there may be one or more requesters and approvers authorized to request and approve trips for that division. For example, a school may have many athletic programs, with many coaches.

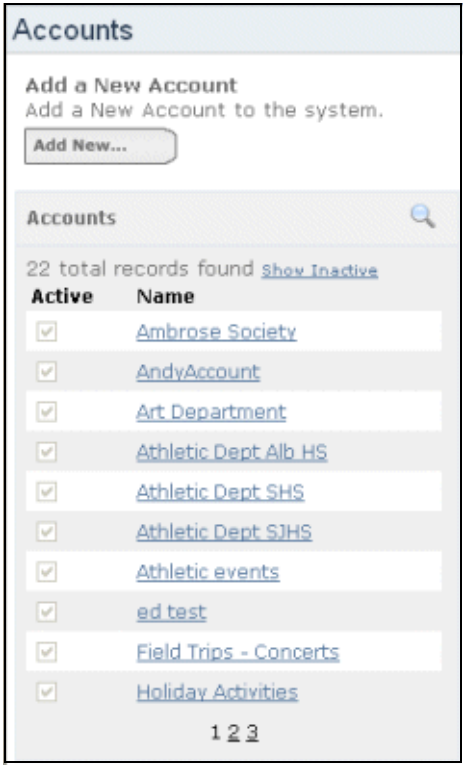
Adding Account Records

An account is the budget item you want to charge field trips against. For example, if your organization breaks the field trip budget down by school and then further by group, you might enter the name of the school and the group name in the Account field, as in St. Ambrose Athletic Dept or St. Ambrose Class Trips.

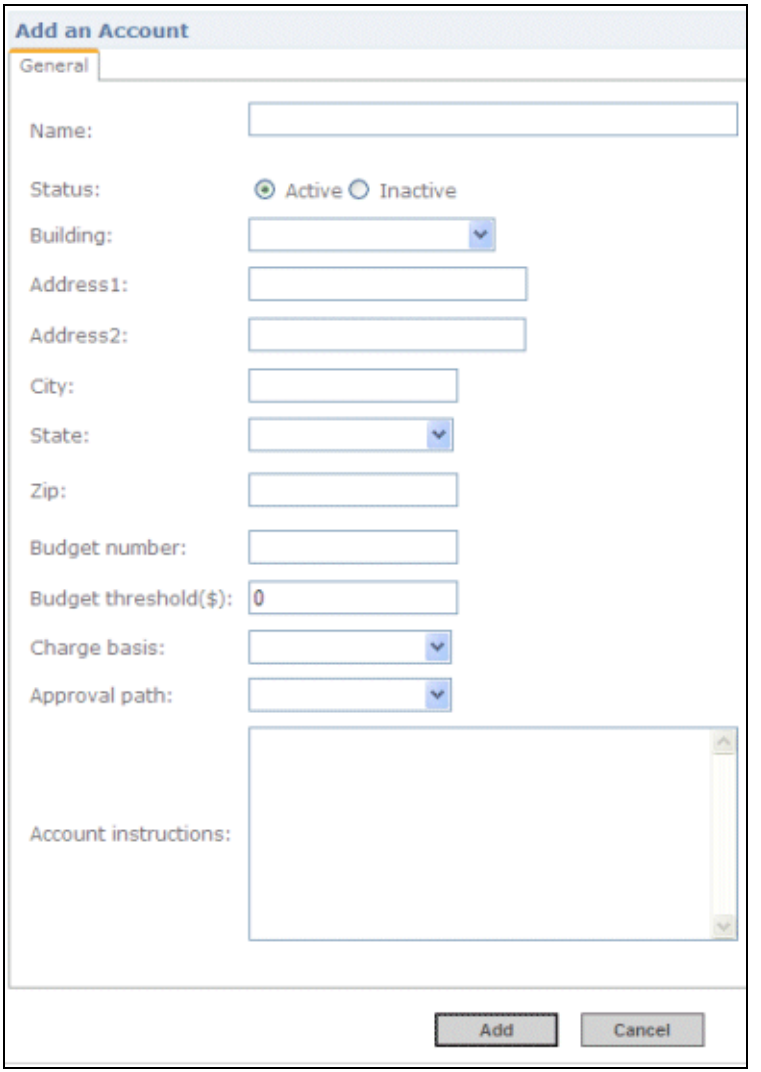
To add account records:

Path:) **Admin > Accounts**

1. Follow the above path to display the Accounts screen.



2. Click Add New... to display a blank record.



3. Enter a name for the account.

4. Select Active for the status. An inactive account cannot have new trips requests assigned to it. Trips already assigned to an account which has been made inactive will be available for financial transactions and reports.

5. Complete the fields by typing the information or selecting from drop-down lists. If you need help with any of these fields, see the field descriptions below.

   Building
   This is the building associated with this account.

   Address, City, State and ZIP
   These fields will be automatically filled in from the information contained in the Building record.

   Budget Number
   This is your internal code (if any) associated with this account. This number displays on the invoice.

   Budget Threshold
   The amount limit at which the system emails the Requester. For example, if you enter $150 in this field, the system sends an email to the Requester when there is $150 or less remaining in the budget for this account.

   Charge Basis
   A charge basis can be selected from a drop-down list of available charge basis records. See, *Adding a Charge Basis* on page 45. This is the charge basis that will be associated with this account. This charge basis will be applied to all trips charged to the account. The charge basis can be overridden during the trip request process.

   Approval Path
   An approval path can be selected from a drop-down list of available approval path records (see, *Adding a New Approval Path* on page 162). This is the approval path that will be associated with this account. This approval path will be applied to all trips charged to the account.

   Account Instruction
   Any special instructions associated with the account.

6. When you have completed these entries, click

to save the new record.

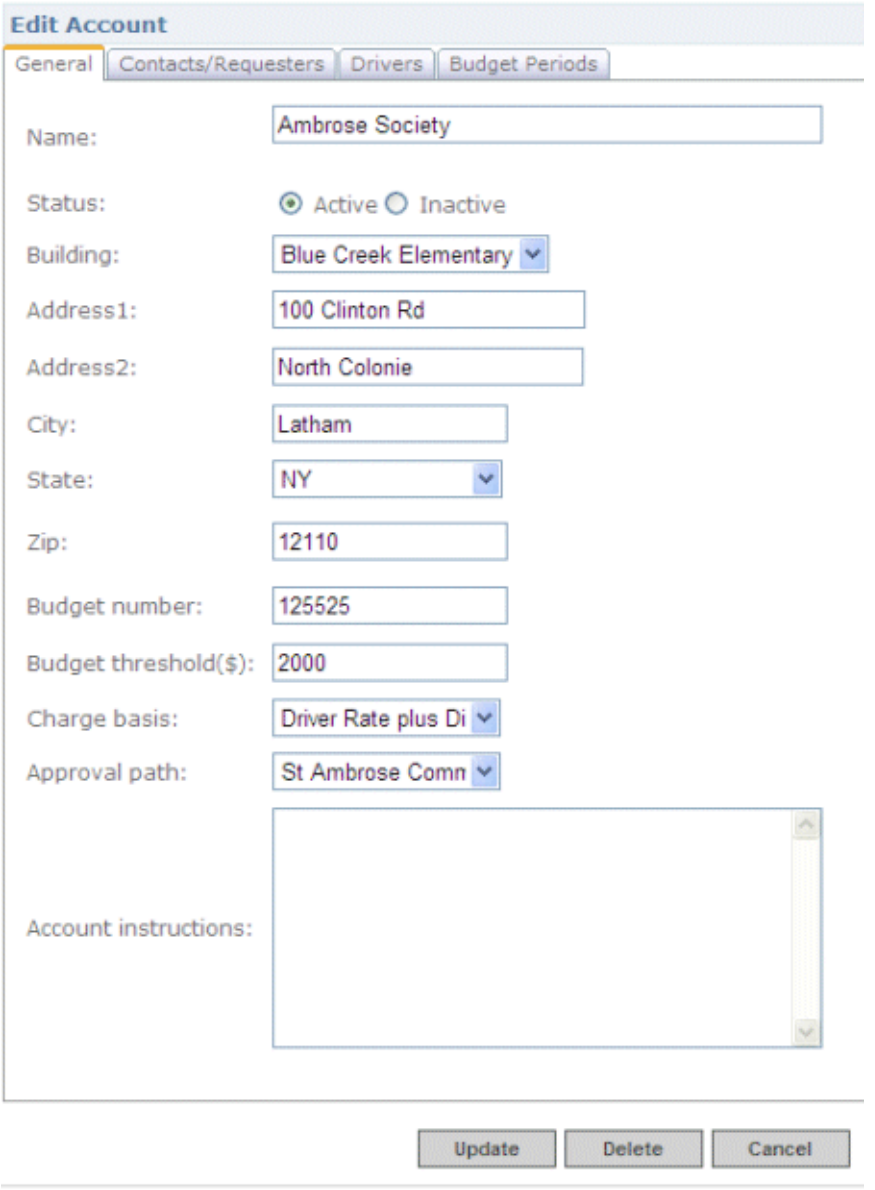
Editing Account Records

To edit transportation account records:

Path:) **Admin > Accounts**

1. Follow the above path to display the Accounts screen.

2. Click on the account name that you want to edit.



3. Edit the fields by typing in the new information or selecting from drop-down lists. If you need help with any of these fields, see *Adding Account Records* on page 64.
4. Click Update when you have finished making changes to the account record.

Deleting an Account Record

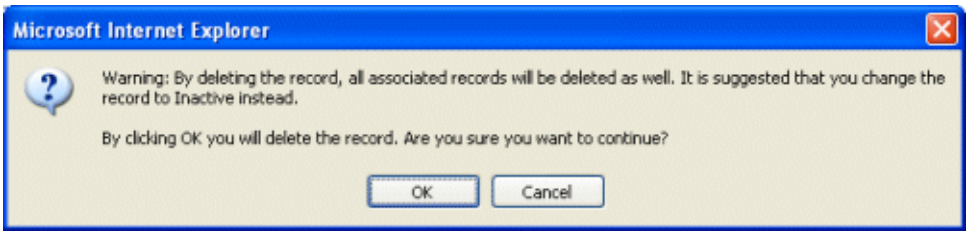
To delete an account record:

Path:) **Admin > Accounts**

1. Follow the above path to display the Accounts screen.
2. Click on the account that you want to delete.

   Note: *It is recommended that an account record is made Inactive and not deleted because when you delete this record, all associated records will be deleted as well.*

3. Click Update and then click Delete.


Microsoft Internet Explorer
Warning: By deleting the record, all associated records will be deleted as well. It is suggested that you change the record to Inactive instead.
By clicking OK you will delete the record. Are you sure you want to continue?
OK
Cancel

4. Click **OK** and the transportation record and all associated records are deleted.

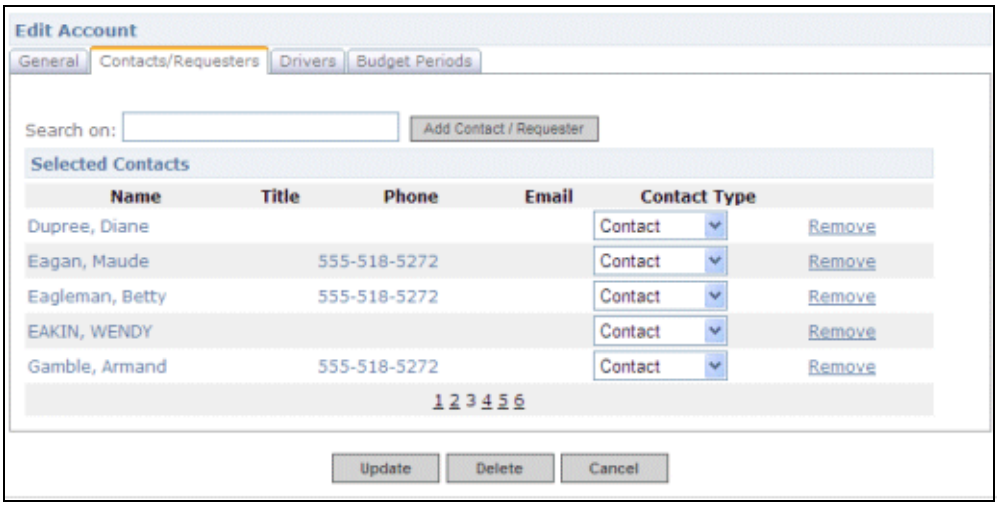
Adding Contacts/Requesters to an Account Record

Once you have set up an account record, you can add contacts and requesters to that record. A contact is a person who has a reason to be notified of the status of a particular field trip. A requester is the person requesting a trip. A person can be both a contact and a requester.

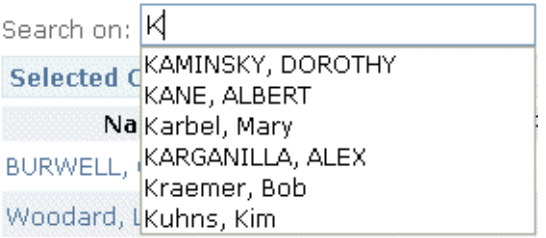
To add contacts/requesters to an account record:

Path:) Admin > Accounts

1. Follow the above path to display the Accounts screen.
2. Click on the account name that the contacts/requesters are to be added to. The Edit Account screen displays.



3. Start typing a name into the **Search on** field. As the system finds a match, it displays those matches. The list of available names is based on the employees in the system.



4. Click on a name to select it.
5. Click the Contact Type drop-down button for the new contact/requester.

6. Select either contact, requester or both.
7. If you want to remove a name from the list, click Remove next to the name that you want removed.
8. Click Update when you are finished making entries.

Editing Account Record Contacts/Requesters

In the Edit Account screen described below, you can change whether an employee is a contact, requester or both. To change information such as title, phone or email, see *Finding & Editing an Employee's Record* on page 150.

To edit a contact/Requester:

Path:) Admin > Accounts

1. Follow the above path to display the Accounts screen.
2. Click on the account name that contains the contacts/requesters that you want to work with. The Edit Account screen displays.
3. Click on the Add Contact / Requester tab.
4. Click the Contact Type drop-down button for the contact/requester you want to edit.

5. Select either contact, requester or both.

Deleting Account Record Contacts/Requesters

You can delete a contact or requester from the system only if you have not used it in any trip record. If you try to delete a contact or requester that is attached to one or more trip records, the system prevents you.

1. Follow the above path to display the Accounts screen.
2. Click on the account name that contains the contacts/requesters that you want to delete. The Edit Account screen displays.
3. Click on the Add Contact / Requester tab.
4. Highlight the name that you want to delete and click Delete.

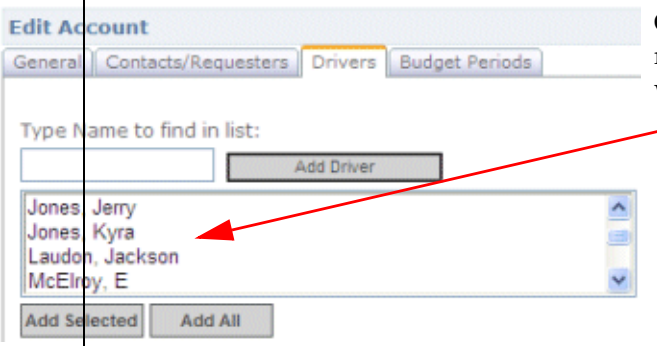
Adding Drivers to An Account

This feature allows you to add specific drivers to specific accounts. You will then be able to filter drivers by account when scheduling a trip (see, *Scheduling a Trip* on page 199).

To add drivers to an account:

Path:) **Admin > Accounts**

1. Follow the above path to display the Accounts screen.
2. Click on the account name that you will be adding drivers to.
3. Click on the Drivers tab.



The following criteria determines what employee names appear in the list:

- Only employees designated as "Driver" will appear in the list. The "Driver" checkbox in the Employee Record must be checked.
- Only active employees/drivers will appear on the list.
- "Qualified for activity vehicle" and "Appear in driver queue" must be checked in the Employee Record.

Note: *If any of the pertinent criteria are no longer met, the employee will not show in the list of drivers for the account.*

4. Type a name into the "Type Name to find in list" field and when the system finds a match, it displays those matches.
5. Select a single name by clicking on the name or select multiple names by using the Ctrl key.
6. Click Add Driver for a single name or Add Selected for multiple names to add those driver's names to the account and display them as shown below:

7. Click Update when you are finished adding drivers.

Adding a Budget Period

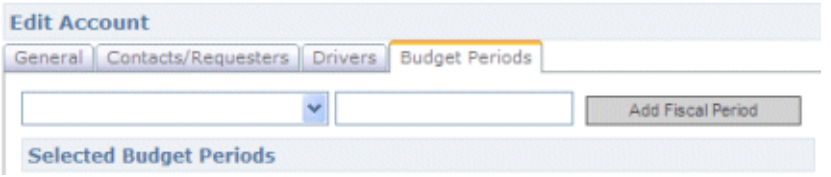
The budget period refers to the budget amount allotted for a fiscal period. A fiscal period is the term of your budget which is usually the school year for districts. Complete your fiscal period entries before adding a budget period as described in *Setting Up the Fiscal Periods* on page 59.

To add a budget period:

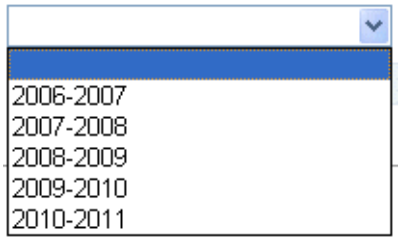
Path:) Admin > Accounts

1. Follow the above path to display the Accounts screen.
2. Click on the account name that you will be adding a budget period to.

3. Click on the Budget Periods tab.

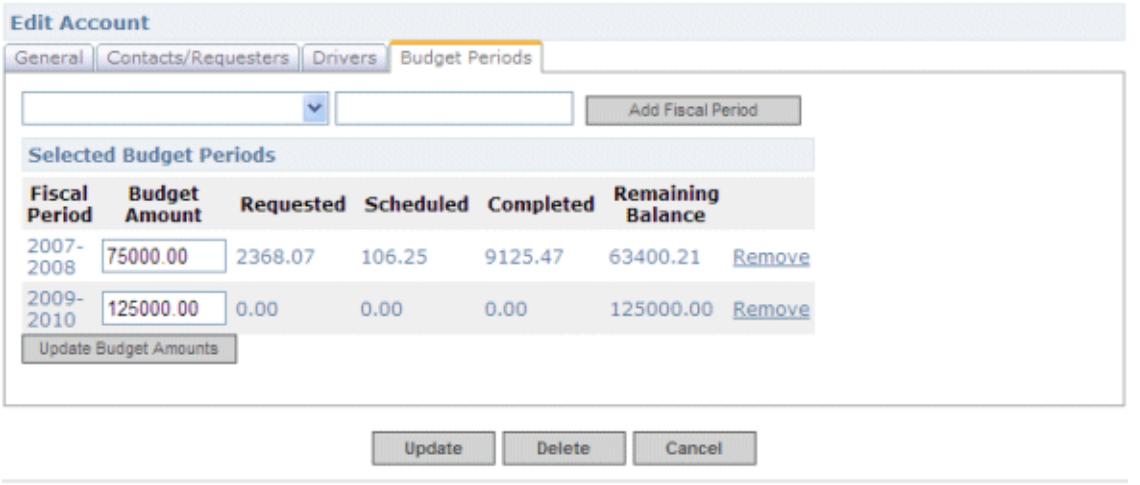


4. Click the drop-down box to display the fiscal periods you have already entered. See, *Adding a Fiscal Period* on page 60 for information on how to add a fiscal period.



5. Select a fiscal period from the list.

6. Click Add Fiscal Period .



Budget Amount
Enter the amount allowed for in this budget item for this account.

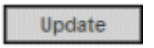
7. Click Update Budget Amounts to update the remaining balance.

Requested
Dollar total of all trips assigned to this account in the requested stage.

Scheduled
Dollar total of all trips assigned to this account when a trip is scheduled.

Completed
Dollar total of all trips assigned to this account when the trip has been completed.

Remaining Balance
Remaining balance = budget amount - (completed + scheduled + requested).

8. When you are finished making entries, click 

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Setting Up Trip Locations

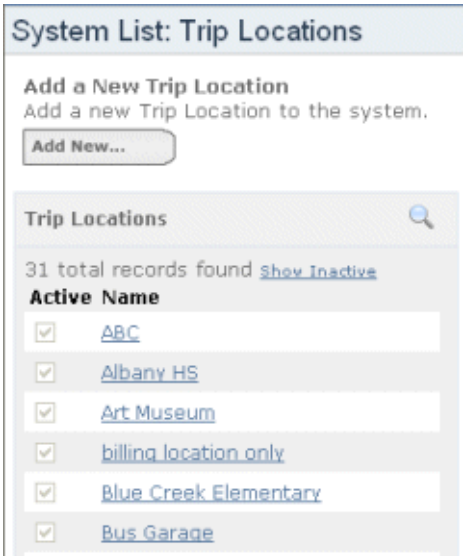
Trip Locations are the destinations and origins of a field trip whether students are going from school to the museum, or from the away game field back to school. Trip locations can either be imported into VersaTrans TripTracker or entered manually. See, *Using the Import Utility* on page 267.

Adding a Trip Location

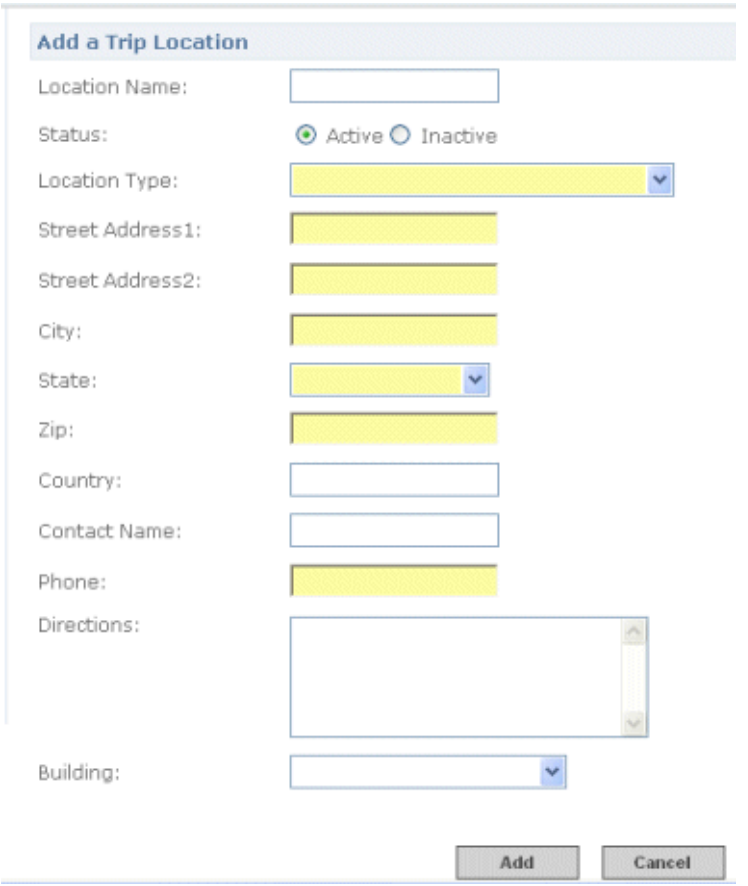
To add a trip location:

Path:) Admin > System Lists > Trip Locations

1. Follow the above path to display the System List: Trip Locations screen.



2. Click Add New... to display a blank record.



3. Enter the name of the trip location in the Location Name field.
4. Make sure that the Active check box is checked.

5. Click the Location Type drop-down button to display a list of location types (Billing Location, Can be either a destination or an origin, Destination only and Origin only). Select the location type that is appropriate for the record you are entering. Trip origins are always the starting places for field trips; trip destinations are the places you are going to.

   An example of a trip destination that may also be an origin is a high school. Elementary school students may go to the high school for a program but high school students may go on field trips too.

   Street Address/City//State/Zip
   It is important that valid information is entered since the information entered here will be used for generating textual point-to-point directions and a map.

   Directions
   The directions entered here will be used when you are creating directions for a trip request.

6. Click the Building drop-down button and select a building from the list. When a trip is being requested, the requester is associated with an account. The building associated with the requester's account will be used to identify the origin location and will automatically populate the Trip Origin field on the trip request.
7. Click

to add the new trip location. The new trip location appears on the Trip Locations list.

Editing a Trip Location

When a trip is being requested, the Requester is associated with an account. The building associated with the Requester's account will be used to identify the origin location and will populate the Trip Origin field on the Trip Request.

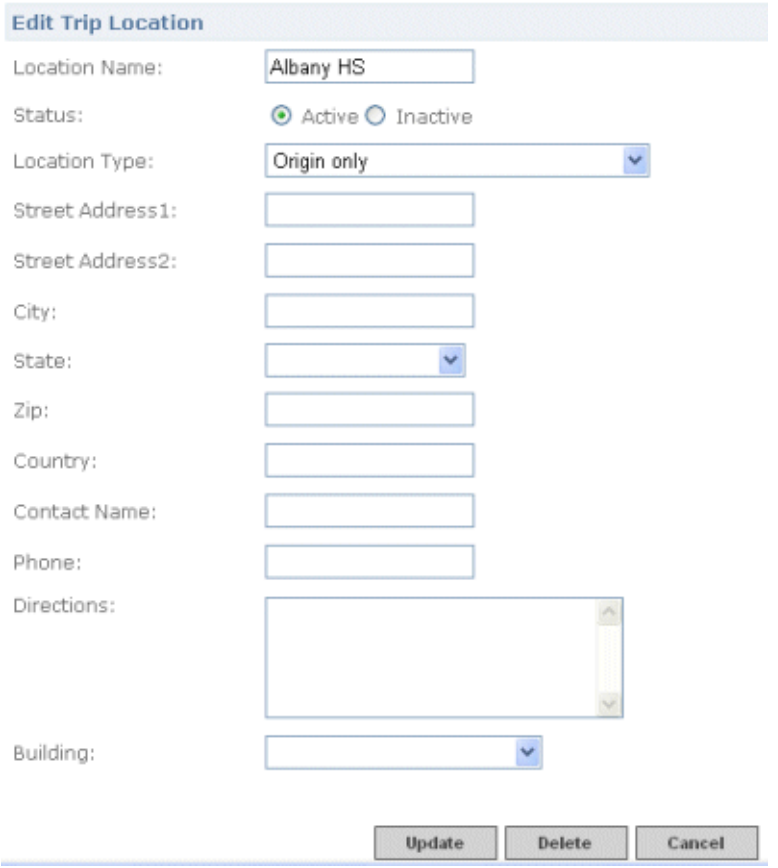
To edit a trip location:

Path:) Admin > System Lists > Trip Locations

1. In the System Lists: Trip Locations screen, click to display the blank search panel.

2. Start typing the name of the trip location. As you enter text, the system will display a list of trip locations that comes closest to matching the text entered.

3. Select a trip location to display the Edit Trip Location screen.



4. Make the desired changes in the associated fields.
5. You can change the status to **ACTIVE** or **INACTIVE**.

   Trip Locations which have been checked as **ACTIVE** will appear for selection in drop-down lists throughout the application.

If you change an Active status to **Inactive**, the status change will take effect once the status change has been saved. The inactive trip location name will no longer be actively tracked.

6. After you complete your changes, click Update to save your changes.

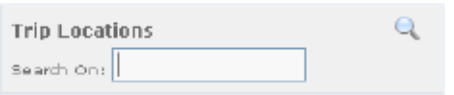
Deactivating a Trip Location

You can deactivate a trip location so it doesn't display as an option in the future.

To deactivate a trip location:

Path:) Admin > System Lists > Trip Locations

1. In the System Lists: Trip Locations screen, click to display the blank search panel.



2. Start typing the name of the trip location. As you enter text, the system will display a list of trip locations that comes closest to matching the text entered.
3. Select a trip location to display the Edit Trip Location screen.
4. Click Inactive in the Status field.
5. Click Update to save your changes.

Showing Inactive Trip Location Records in the Trip Locations List

Only the "active" trip location records display in the trip location list. You have the option of displaying the "Active" and "Inactive" trip location records in the trip locations list.

To show active and inactive trip location records in the Trip Locations list:

Path:) Admin > System Lists > Trip Locations

- Click Show Inactive in the Trip Locations screen to show the active and inactive records.

Setting Up Trip Types

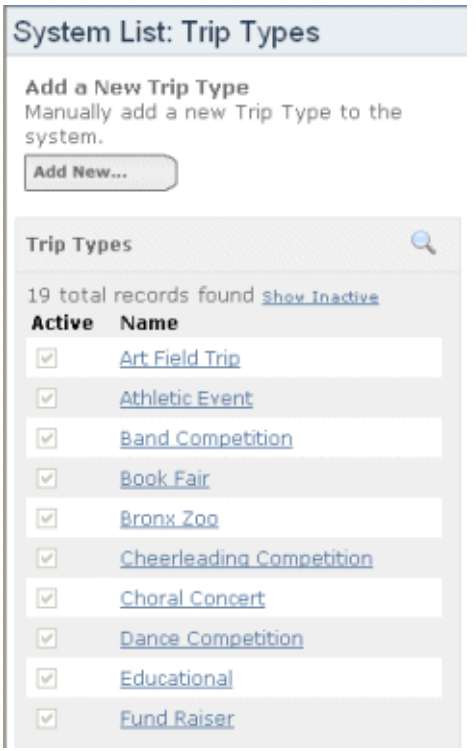
Trip Types are a way of grouping related trips together and may be used in conjunction with Activity Types (see, *Setting Up Trip Activity Types* on page 91) or used alone or not at all depending on your needs.

Adding a Trip Type

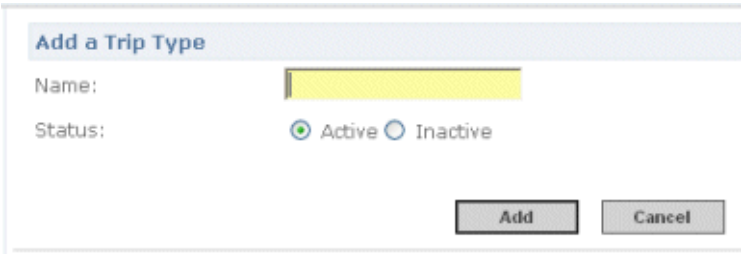
To add a trip type:

Path:) **Admin > System Lists > Trip Types**

1. Follow the above path to display the System List: Trip Types screen.



2. Click Add New... to display a blank record.



3. Enter the name of the Trip Type in the Name field.

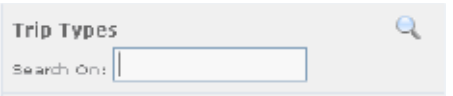
4. Select **ACTIVE** for the status. Trip Types which have been checked as Active will appear for selection in drop-down lists in the Trip Details.
5. Click Add to add the new trip type. The new trip type appears on the Trip Type list.

Editing a Trip Type

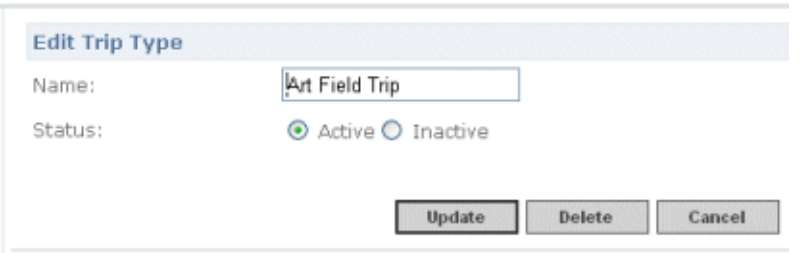
To edit a trip type:

Path:) Admin > System Lists > Trip Types

1. In the System Lists: Trip Type screen, click to display the blank search panel.



2. Start typing the name of the trip type. As you enter text, the system will display a list of trip types that comes closest to matching the text entered.
3. Select a trip type to display the Edit Trip Type screen.



4. You can change the name and status of the trip type.

5. After you complete your changes, click Update to save your changes.

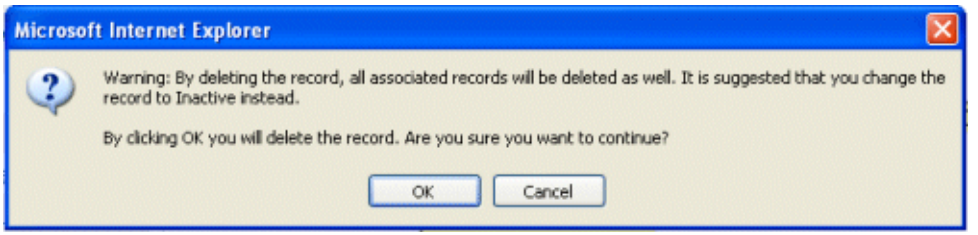
Deleting a Trip Type

To delete a trip type:

Path:) Admin > System Lists > Trip Types

1. In the System Lists: Trip Type screen, click to display the blank search panel.

2. Start typing the name of the trip type. As you enter text, the system will display a list of trip types that comes closest to matching the text entered.
3. Select a trip type to display the Edit Trip Type screen.
4. Click Delete.


Microsoft Internet Explorer
Warning: By deleting the record, all associated records will be deleted as well. It is suggested that you change the record to Inactive instead.
By clicking OK you will delete the record. Are you sure you want to continue?
OK
Cancel

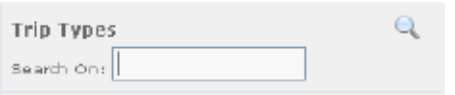
5. Click **OK** to delete the trip type record. The record is deleted and its name is removed from the Trip Types list.

Deactivating a Trip Type

To deactivate a trip type:

Path:) **Admin > System Lists > Trip Types**

1. In the System Lists: Trip Type screen, click to display the blank search panel.



2. Start typing the name of the trip type. As you enter text, the system will display a list of trip types that comes closest to matching the text entered.
3. Select a trip type to display the Edit Trip Type screen.
4. Click in the Status field.
5. Click to save your changes.

Showing Inactive Trip Type Records in the Trip Types List

Only the "active" trip type records display in the trip type list. You have the option of displaying the "Active" and "Inactive" trip type records in the trip type list.

To show active and inactive trip type records in the Trip Types list:

Path:) **Admin > System Lists > Trip Types**

- Click in the Trip Types screen to show the active and inactive records.

Setting Up Trip Activity Types

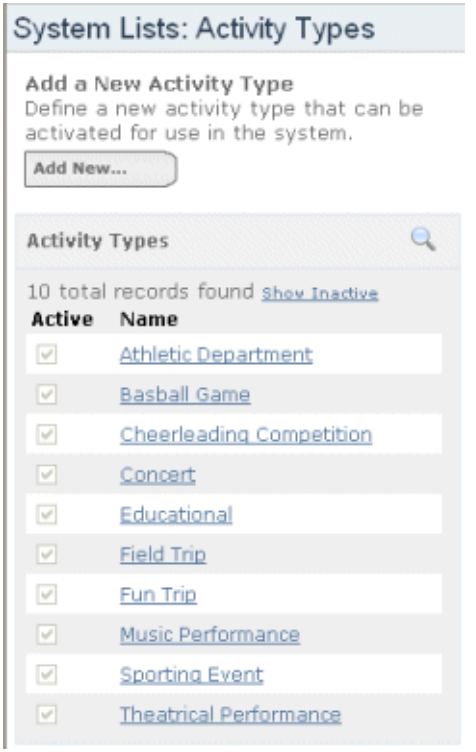
Activity Types may be used as a subset of Trip Types (see, *Setting Up Trip Types* on page 86) if your district requires the differentiation. For example, a Trip Type could be Sports and the Activity Type could be Soccer or Basketball, etc. They are used primarily in reporting. They may also be used instead of Trip Types or not used at all.

Adding an Activity Type

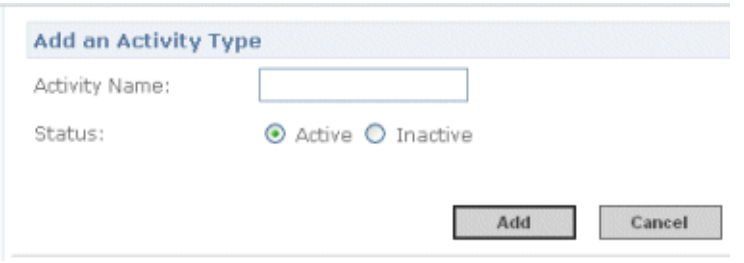
To add an activity type:

Path:) **Admin > System Lists > Activity Types**

1. Follow the above path to display the System List: Activity Types screen.



2. Click **Add New...** to display a blank record.



3. Enter the name of the Activity Type in the Name field.

4. Select **ACTIVE** for the status. Activity Types which have been checked as Active will appear for selection in drop-down lists in the Trip Details.
5. Click Add to add the new Activity type. The new activity type appears on the Activity Type list.

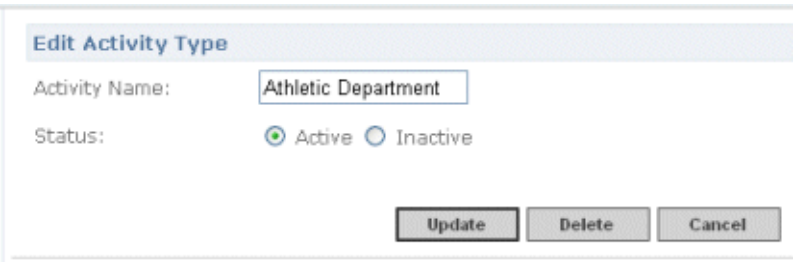
Editing an Activity Type

To edit an activity type:

Path:) Admin > System Lists > Activity Types

1. In the System Lists: Activity Type screen, click to display the blank search panel.

2. Start typing the name of the activity type. As you enter text, the system will display a list of activity types that comes closest to matching the text entered.
3. Select an activity type to display the Edit Activity Type screen.



4. You can change the name and status of the activity type.

5. You can change the status to **ACTIVE** or **INACTIVE**.

   Activity Types which have been checked as **ACTIVE** will appear for selection in Trip Details.

   If you change an Active status to **Inactive**, the status change will take effect once the status change has been saved. The inactive activity type will no longer be actively tracked.

6. After you complete your changes, click Update to save your changes.

Deleting an Activity Type

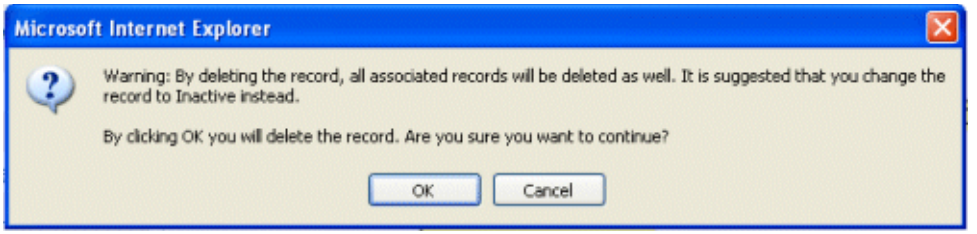
To delete an activity type:

Path:) **Admin > System Lists > Activity Types**

1. In the System Lists: Activity Type screen, click to display the blank search panel.

2. Start typing the name of the activity type. As you enter text, the system will display a list of activity types that comes closest to matching the text entered.
3. Select an activity type to display the Edit Activity Type screen.

4. Click Delete.


Microsoft Internet Explorer
Warning: By deleting the record, all associated records will be deleted as well. It is suggested that you change the record to Inactive instead.
By clicking OK you will delete the record. Are you sure you want to continue?
OK
Cancel

5. Click **OK** to delete the trip type record. The record is deleted and its name is removed from the Trip Types list.

Deactivating an Activity Type

To deactivate an activity type:

Path:) Admin > System Lists > Activity Types

1. In the System Lists: Activity Type screen, click to display the blank search panel.

2. Start typing the name of the activity type. As you enter text, the system will display a list of activity types that comes closest to matching the text entered.
3. Select an activity type to display the Edit Activity Type screen.
4. Click Inactive in the Status field.
5. Click Update to save your changes.

Showing Inactive Activity Type Records in the Activity Types List

Only the "active" activity type records display in the activity type list. You have the option of displaying the "Active" and "Inactive" acitivity type records in the activity type list.

To show active and inactive activity type records in the Activity Types list:

Path:) **Admin > System Lists > Activity Types**

- Click Show Inactive in the Activity Types screen to show the active and inactive records.

Setting Up Vehicle Records

The Vehicle screen contains information about the vehicles in the vehicle file and about the routes each vehicle runs. VersaTrans TripTracker uses vehicle records to manage the vehicles your organization uses for field trips. If you are currently working with VersaTrans RP and/or VersaTrans FleetVision, you have probably set up most of the vehicle records. These records can also be imported into VersaTrans TripTracker.

The following topics are covered in this section:

Adding a Vehicle Record on page 97

Viewing the Routing Information for a Vehicle on page 102

Editing a Vehicle Record on page 103

Deactivating a Vehicle Record on page 109

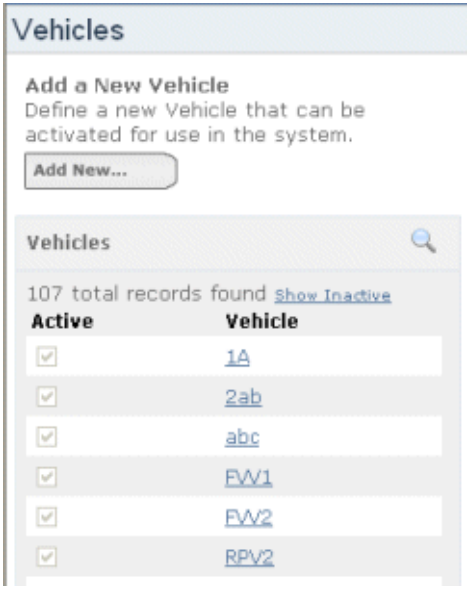
Finding a Vehicle Record on page 105

Adding a Vehicle Record

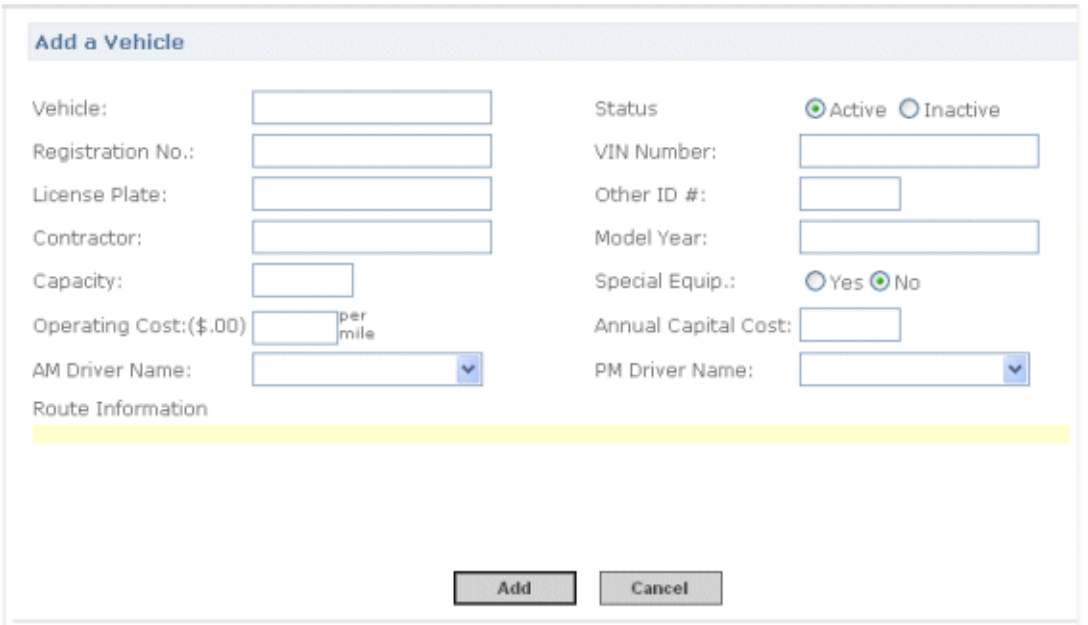
To add a vehicle record:

Path:) Admin > Vehicles

1. Follow the above path to display the Vehicles screen.



2. Click Add New... to display a blank record.



Note: *If you have VersaTrans RP and VersaTrans FleetVision, the building, vehicle, and employee data is shared. Any edits, adds, or deletes that are made here will impact your VersaTrans RP and VersaTrans FleetVision data.*

3. Type the name or number of this vehicle in the **Vehicle** field.
4. Select **ACTIVE** for the status. Vehicles which have been checked as Active will appear for selection in drop-down lists.
5. Complete the remaining fields selections for the vehicle record.

Registration No.
The registration number of the vehicle assigned by the Department of Motor Vehicles.

VIN Number
Enter the manufacturer's serial number for the vehicle.

License Plate
Enter the license plate number of the vehicle.

Other ID #
This field allows you to enter an additional ID number for the vehicle if applicable.

Contractor
Enter the name of the contractor.

Model Year
Enter the year of manufacture for the vehicle.

Capacity
Enter the legal capacity of the vehicle.

Special Equip.
Select **Yes** if vehicle is equipped with special equipment or **No** if it is not equipped with special equipment. Indicates vehicles with special equipment without specifically noting the special equipment.

Operating Cost
Enter the cost/mile (in cents per mile/kilometer) that represents the operating cost of the vehicle.

Annual Capital Cost
Enter the dollar amount to be assigned as this vehicle's annual capital outlay for a vehicle. When the amount appears significantly high, it may indicate a significant benefit in removing a bus from service.

AM Driver Name
Select the vehicle's driver from the drop-down list (make sure the employee record had been entered).

PM Driver Name
Select the vehicle's driver from the drop-down list (make sure the employee record had been entered).

6. Click

to add the new vehicle record. The new vehicle record displays in the Vehicles screen. Assigned routes display in the Route Information panel at the bottom of this screen. See, *Viewing the Routing Information for a Vehicle* on page 102.

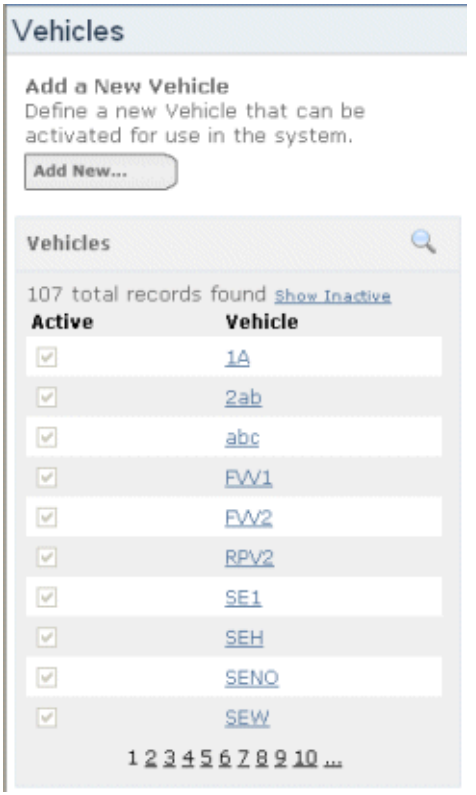
Viewing the Routing Information for a Vehicle

Some vehicle records in the VersaTrans TripTracker vehicle file contain assigned routes which display in the Route Information panel at the bottom of the Add and Edit Vehicle screens. You cannot make any changes in the Route Information panel.

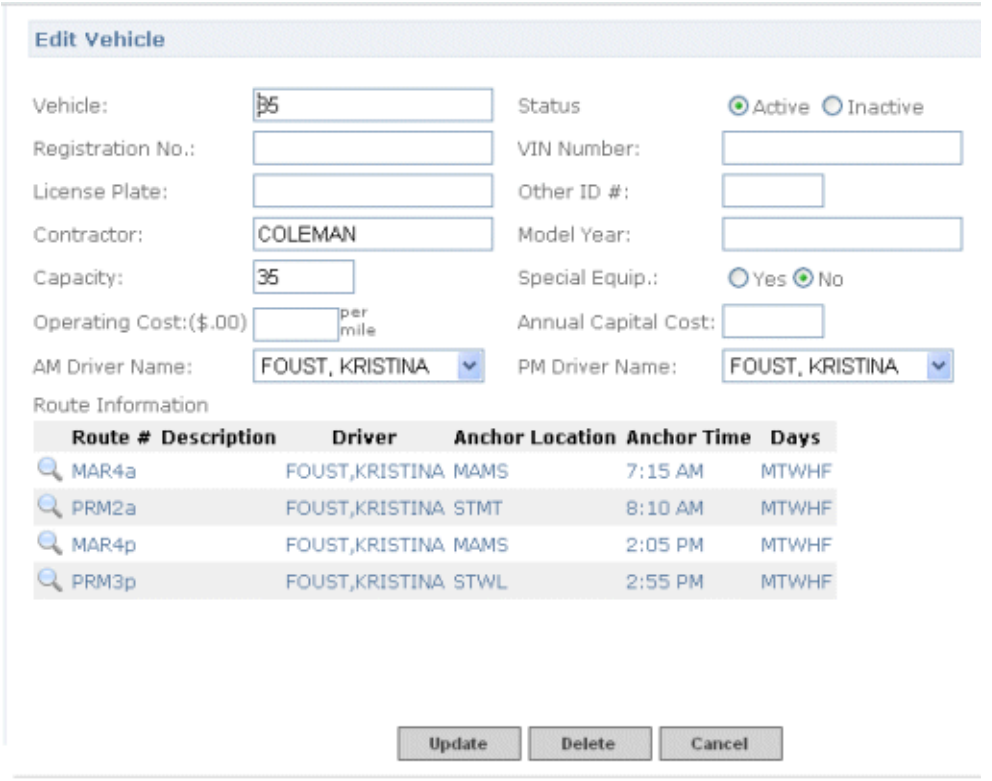
To view the routes assigned to the selected vehicle:

Path:) **Admin > Vehicles**

1. Follow the above path to display the Vehicles screen.



2. Click on a vehicle to display the Edit Vehicle screen. If routes have been assigned to this vehicle, the Route Information panel displays.

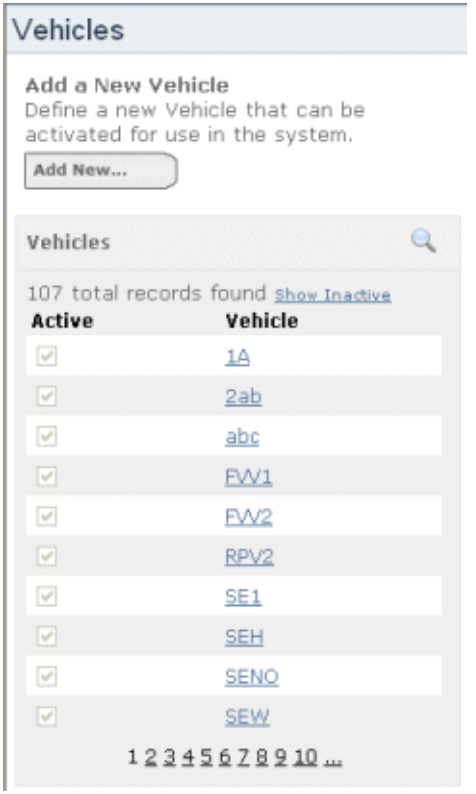


Editing a Vehicle Record

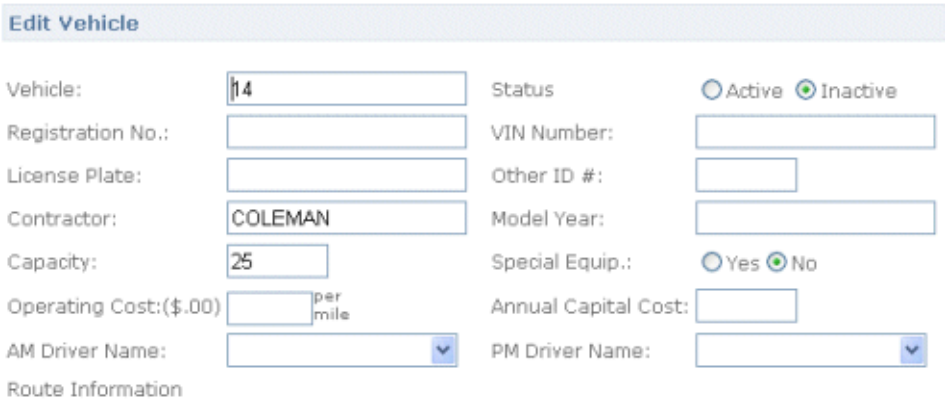
To edit a vehicle record:

Path:) **Admin > Vehicles**

1. Follow the above path to display the Vehicles screen.



2. Click on a vehicle to display the Edit Vehicle screen.



3. Type over the fields you want to change or make a new selection from the drop-down lists.
4. Click **Update** to add the changes to the vehicle record.

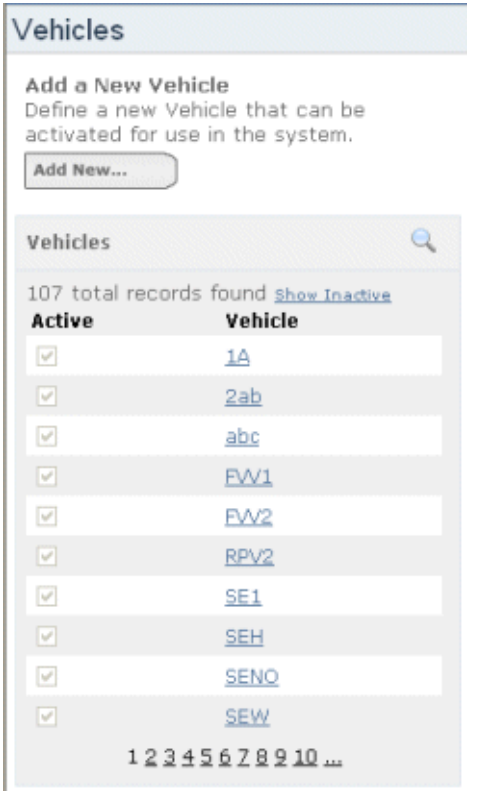
be imported into VersaTrans TripTracker.

Finding a Vehicle Record

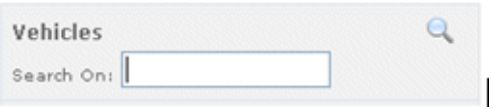
To find a vehicle record:

Path:) **Admin > Vehicles**

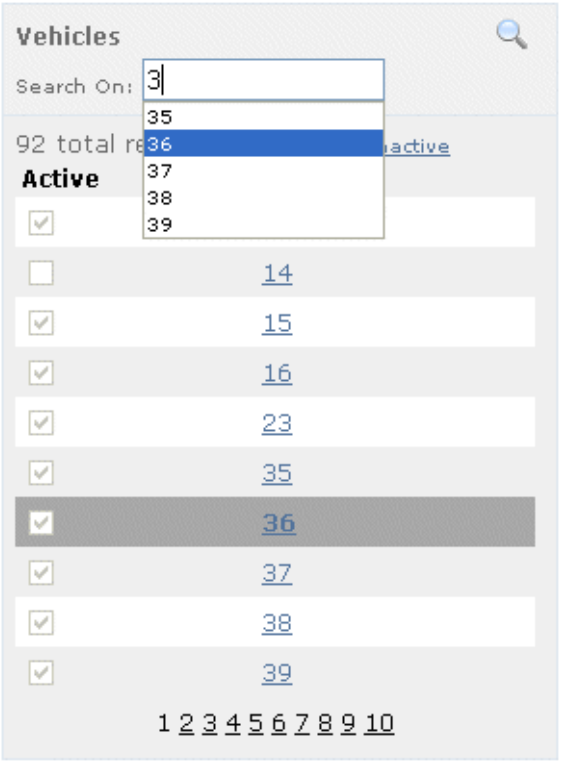
1. Follow the above path to display the Vehicles screen.



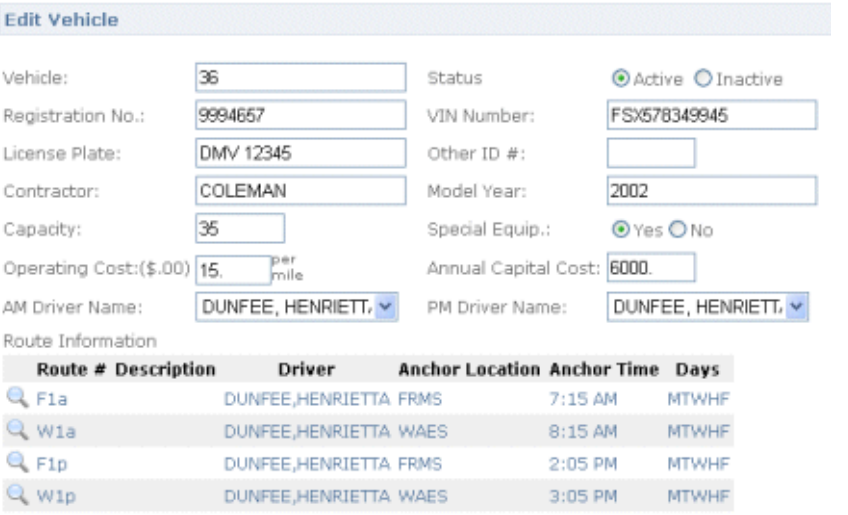
2. Click to display the blank search panel.



3. Enter a vehicle identification number in the **Search On** field. As you enter the vehicle identification number, the system will display a list of vehicles containing the numbers entered.



4. Move the cursor over a vehicle number and right-click on that vehicle number to select it. The Edit Vehicle screen for the selected vehicle displays.

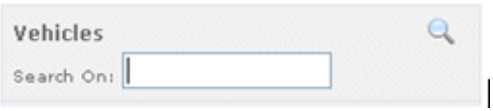

Edit Vehicle
Vehicle: 36
Status Active Inactive
Registration No.: 9994657
VIN Number: FSX578349945
License Plate: DMV 12345
Other ID #:
Contractor: COLEMAN
Model Year: 2002
Capacity: 35
Special Equip.: Yes No
Operating Cost:($.00) 15. per mile
Annual Capital Cost: 6000.
AM Driver Name: DUNFEE, HENRIETT
PM Driver Name: DUNFEE, HENRIETT
Route Information
Route # Description Driver Anchor Location Anchor Time Days
F1a DUNFEE,HENRIETTA FRMS 7:15 AM MTWHF
W1a DUNFEE,HENRIETTA WAES 8:15 AM MTWHF
F1p DUNFEE,HENRIETTA FRMS 2:05 PM MTWHF
W1p DUNFEE,HENRIETTA WAES 3:05 PM MTWHF

Deactivating a Vehicle Record

To deactivate a vehicle record:

Path:) **Admin > Vehicles**

1. Click to display the blank search panel.



2. Enter a vehicle identification number in the **Search On** field. As you enter the vehicle identification number, the system will display a list of vehicles containing the numbers entered.
3. Select a vehicle to display the Edit Vehicle screen.
4. Click in the Status field.
5. Click to save your changes.

Setting Up Employee Records

You can keep track of a wide variety of certifications and employee records in the VersaTrans TripTracker system. Most frequently you keep track of drivers, their certifications, their hiring information, and their drug testing records. If you are currently working with VersaTrans RP and VersaTrans FleetVision, you have probably set up most of the employee records. These records can also be imported into VersaTrans TripTracker.

If you are installing VersaTrans TripTracker from scratch, there is a definite order you need to follow to set up certification and employee records properly.

1. ***Certification Records***: You set these up first so you have base certification records to work with. Here is where you enter all of the certifications required by law and by your organization for all of your employees. Examples could include license classifications, sensitivity certifications and minimum reading competency.

2. ***Employee Type Records***: In these records you match up the certification records you entered with the type of employee to determine which certifications are required for each type of employee. Setting up these records helps you keep on top of each employee's certifications and ensures that each employee is qualified for the position he or she holds.

3. ***Employee Records***: This is where you enter the individual records of your employees. This information includes their address, and other personal data plus the employee type information which carries with it the certification information you entered in the certifications section.

   Note: *If you have VersaTrans RP or VersaTrans FleetVision, employee records that are drivers are seen in both products.*

Setting Up Certification Records

Before you can set up employee records, you have to establish the required and non-required certification records.

Adding Certification Records

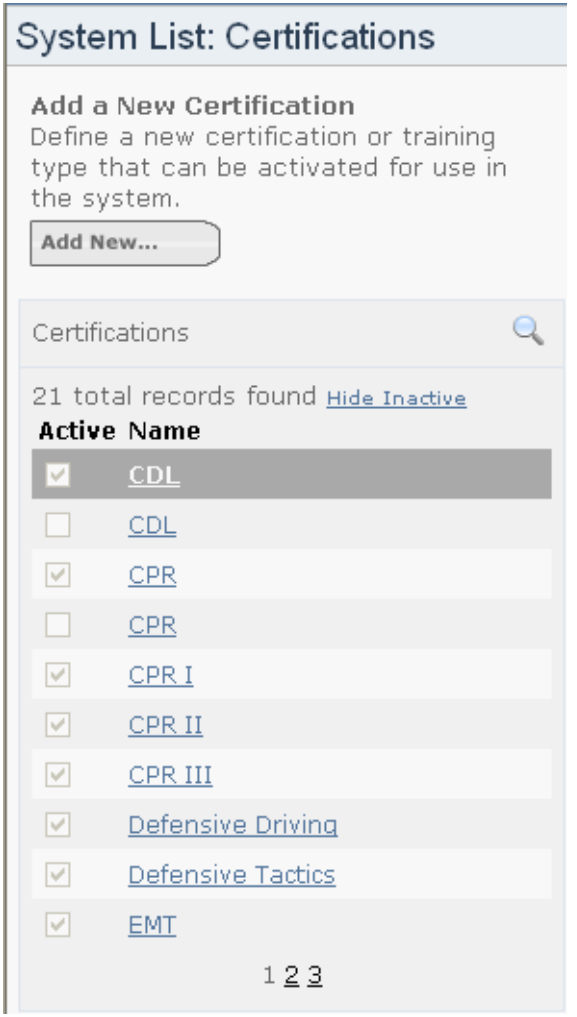
The VersaTrans TripTracker system keeps track of the required certifications for each employee type. When you add a new employee, the system checks to see if the employee meets those minimum requirements for certification. Then, you update their employee record with their certification information. If the employee does not have all of the certifications required, the system displays the missing or overdue certifications.

Before you can add and work with employee records, it is important to enter required certification information. These records establish the minimum certification requirements. In addition, you have to enter the employee type records to tie the workers to their appropriate certifications. Then, in the employee records themselves, you keep track of the individual certification records. You can use these records to ensure your employees' certifications are up-to-date and prevent untimely certification expirations.

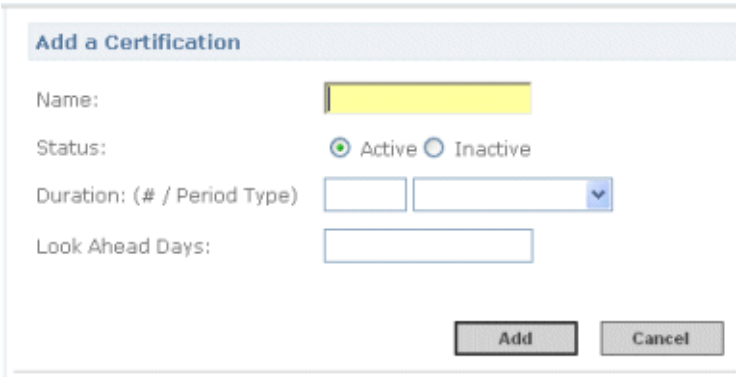
To add certification records:

Path:) **Admin > System Lists > Certifications**

1. Follow the above path to display the System List: Certifications screen.



2. Click Add New... .



3. Complete the fields in the Add a New Certification screen.

Name
Type the name of the certification in this field. For example, Driver.

Status
Select either **Active** or **Inactive**.

Certification names which have been checked as **Active** will appear in any employee record which has an employee type associated with the certification. For example, if Jane Jones is a driver, only certifications which have been associated with drivers will appear in Jane's employee record.

If you change an Active status to **Inactive**, the status change will take effect on future employee records once the status change has been saved. The inactive certification name will not disappear from employee records, but it will no longer be actively tracked.

Duration (#/Period Type)
Enter the amount of time the certificaton is valid for. For example, 365 days or 6 months. You can also select "Never Expires".

Look Ahead Days
Type the number of days warning you want the system to give you when employees' required certification comes due.

When the certification due date falls within the number of days you enter in this field, the system displays the *Coming Due* warning message in the Certifications tab, Status column of the employee's screen and highlights the entry in yellow. When the number of look ahead days is passed, the system highlights the entry in red and displays the label *Overdue*.

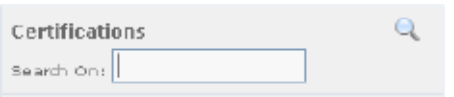
4. When you have completed these entries, click Add to save the new record.
5. You can continue adding new records by clicking Add New....

Editing Certification Records

To edit certification records:

Path:) Admin > System Lists > Certifications

1. Click to display the blank search panel.



2. Enter a certification name in the **Search On** field. As you enter the certification name, the system will display a list of certifications containing the text entered.
3. Select a certification to display the Edit Certification screen.
4. Place your cursor in the field you want to change the entry for and type over the existing entry.
5. After you complete your changes, click Update to save your changes.

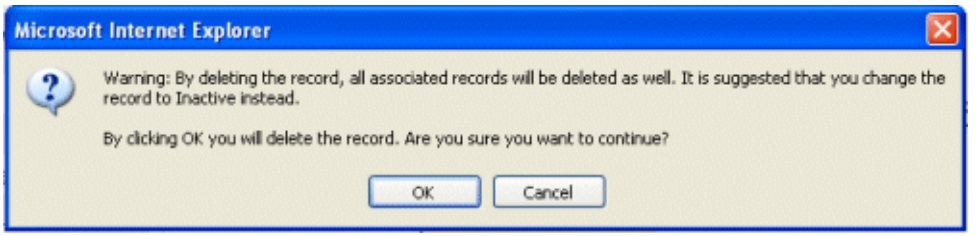
Deleting Certification Records

To delete certification records:

Path:) Admin > System Lists > Certifications

1. Click to display the blank search panel.

2. Enter a certification name in the **Search On** field. As you enter the certification name, the system will display a list of certifications containing the text entered.
3. Select a certification to display the Edit Certification screen.
4. Click .


Microsoft Internet Explorer
Warning: By deleting the record, all associated records will be deleted as well. It is suggested that you change the record to Inactive instead.
By clicking OK you will delete the record. Are you sure you want to continue?
OK
Cancel

5. Click **OK** to delete the certification record. The record is deleted and its name is removed from the Active Name list.

Showing Inactive Certifications in the Certifications List

Only the "active" certifications display in the certifications list. You have the option of displaying the "Active" and "Inactive" certifications in the certifications list.

To show active and inactive certifications in the certifications list:

Path:) **Admin > System Lists > Certifications**

- Click Show Inactive in the Certifications screen to show the active and inactive records.

Setting Up Employee Titles

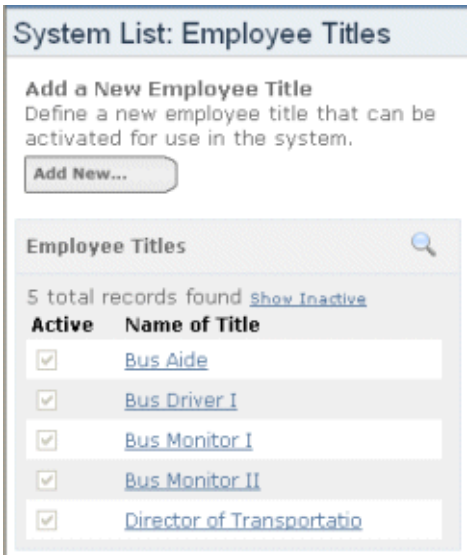
Employee titles are used for categorizing employees and can be used as a separate identifier rather than employee type.

Adding an Employee Title

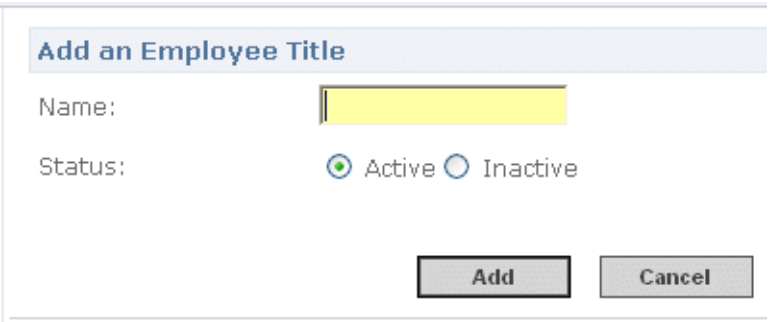
To add an employee title:

Path:) Admin > System Lists > Employee Titles

1. Follow the above path to display the Employee Titles screen.



2. Click Add New... to display a blank record.



3. Enter the name of the Employee Title in the Name field.
4. Select **ACTIVE** for the status. Employee titles which have been checked as Active will appear for selection in drop-down lists throughout the application.
5. Click Add to add the new employee title.

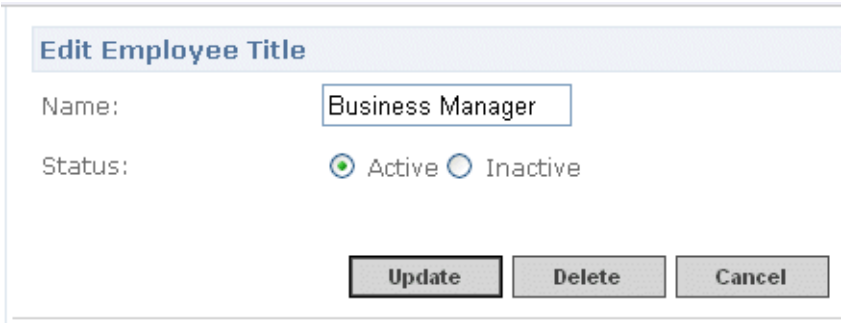
Editing an Employee Title

To edit an employee title:

Path:) **Admin > System Lists > Employee Titles**

1. Follow the above path to display the System List: Employee Titles screen.
2. Click to display the blank search panel.

3. Enter an employee title in the **Search On** field. As you enter the employee title, the system will display a list of employee titles containing the text entered.
4. Select an employee title to display the Edit Employee Title screen.



5. You can change the employee title name by typing a new name in the Name field.
6. You can change the status to **ACTIVE** or **INACTIVE**.

   Employee Titles which have been checked as **ACTIVE** will appear for selection in drop-down lists throughout the application.

   If you change an Active status to **Inactive**, the status change will take effect once the status change has been saved. The inactive employee title will no longer be actively tracked.
7. After you complete your changes, click Update to save your changes.

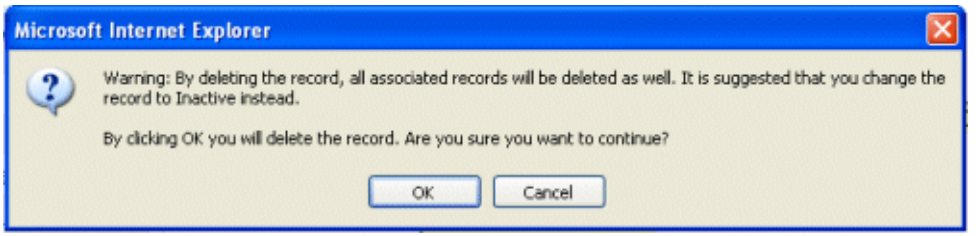
Deleting an Employee Title

To delete an employee title:

Path:) **Admin > System Lists > Employee Titles**

1. Follow the above path to display the System List: Employee Title screen.
2. Click to display the blank search panel.

3. Enter an employee title in the **Search On** field. As you enter the employee title, the system will display a list of employee titles containing the text entered.
4. Select an employee title to display the Edit Employee Title screen.
5. Click **Delete**.


Microsoft Internet Explorer
Warning: By deleting the record, all associated records will be deleted as well. It is suggested that you change the record to Inactive instead.
By clicking OK you will delete the record. Are you sure you want to continue?
OK
Cancel

6. Click **OK** to delete the employee title record. The record is deleted and its name is removed from the Employee Titles list.

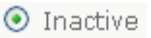
Deactivating an Employee Title

To deactivate an employee title:

Path:) **Admin > System Lists > Employee Titles**

1. Follow the above path to display the System List: Employee Titles screen.

2. Click to display the blank search panel.

3. Enter an employee title in the **Search On** field. As you enter the employee title, the system will display a list of employee titles containing the text entered.
4. Select an employee title to display the Edit Employee Title screen.
5. Click  in the Status field.
6. Click to save your changes.

Showing Inactive Employee Title Records in the Employee Titles List

Only the "active" employee title records display in the employee title list. You have the option of displaying the "Active" and "Inactive" employee title records in the employee title list.

To show active and inactive employee title records in the employee titles list:

Path:) Admin > System Lists > Employee Titles

- Click in the Employee Titles screen to show the active and inactive records.

Setting Up Employee Types

Employee types allow you to assign certifications to a type of employee and to determine which types of certifications are required for that type of employee. Employee type records also help you track the status of employee certifications.

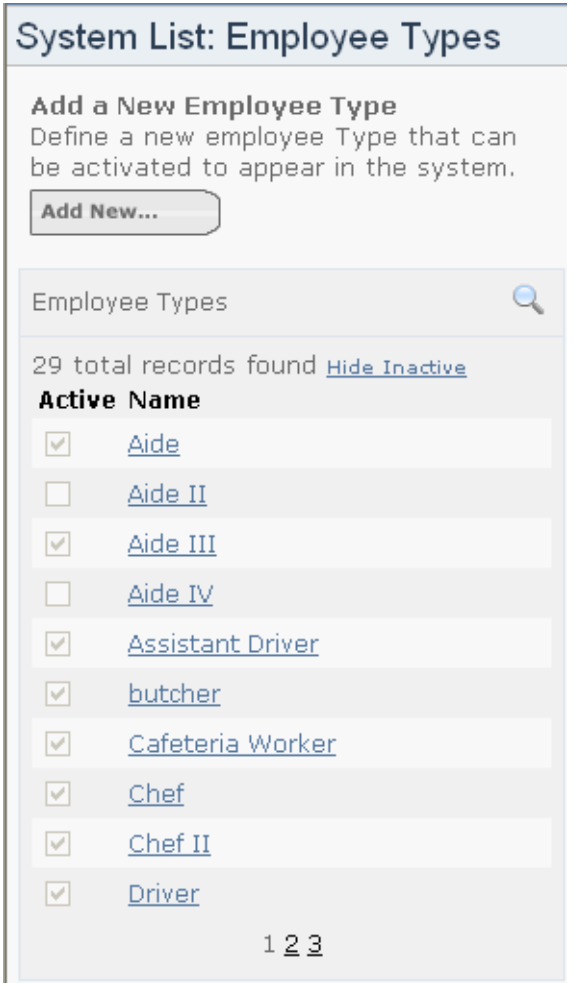
Adding an Employee Type and Associating Certifications

You should set up the certification and employee type information before adding employee records. If you do not set up these records first, they will not be available to associate with an employee type. Once you have completed your employee type records, you can create the individual employee records for your employees or use those available in VersaTrans RP and/or VersaTrans FleetVision.

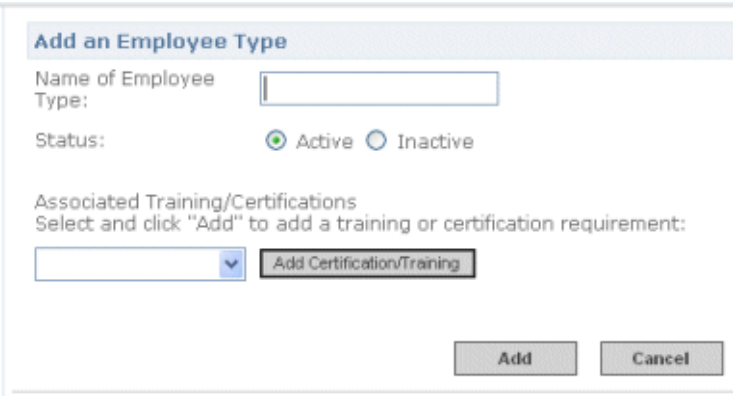
To add an Employee Type:

Path:) **Admin > System Lists > Employee Types**

1. Follow the above path to display the System List: Employee Types screen.



2. Click Add New... to display a blank record.



3. Enter the name of the employee type in the Name of Title field.

   Select **ACTIVE** for the status. Employee Types which have been checked as Active will appear for selection in drop-down lists throughout the application.

4. To add a certification requirement. Select a certification from the drop-down list and click Add.
5. Repeat step 4 for each certification type that you want associated with this employee type.

Editing an Employee Type

Remember, if there are new certifications required for an employee, you must add them in the Certifications section first. See *Setting Up Certification Records* on page 111 for these instructions.

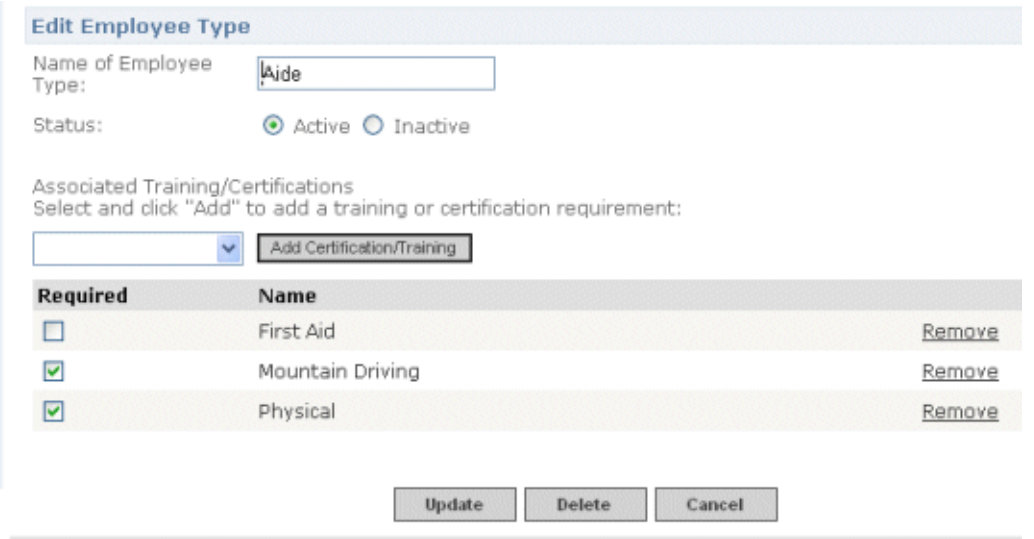
To edit an employee type:

Path:) Admin > System Lists > Employee Types

1. Click to display the blank search panel.

2. Enter an employee type in the **Search On** field. As you enter the employee type, the system will display a list of employee types containing the text entered.

3. Select an employee type to display the Edit Employee Type screen.



4. You can change the name and status of the employee type.
5. You can assign additional certification types for the selected employee type. See, *Adding an Employee Type and Associating Certifications* on page 122.
6. Check **REQUIRED** next to the certifications that are required.
7. You can remove a certification type by clicking Remove.
8. You can delete the selected employee type by clicking Delete
9. After you complete your changes, click Update to save your changes.

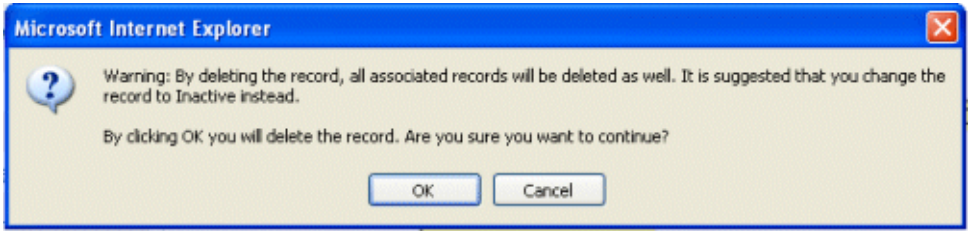
Deleting an Employee Type

To delete an employee type:

Path:) Admin > System Lists > Employee Types

1. Click to display the blank search panel.

2. Enter an employee type in the **Search On** field. As you enter the employee type, the system will display a list of employee types containing the text entered.
3. Select an employee type to display the Edit Employee Type screen.
4. Click Delete.


Microsoft Internet Explorer
Warning: By deleting the record, all associated records will be deleted as well. It is suggested that you change the record to Inactive instead.
By clicking OK you will delete the record. Are you sure you want to continue?
OK
Cancel

5. Click **OK** to delete the employee type record. The record is deleted and its name is removed from the Employee Types list.

Showing Inactive Employee Type Records in the Employee Types List

Only the "active" employee type records display in the employee type list. You have the option of displaying the "Active" and "Inactive" employee type

records in the employee type list.

To show active and inactive employee type records in the employee types list:

Path:) **Admin > System Lists > Employee Types**

- Click Show Inactive in the Employee Types screen to show the active and inactive records.

Setting Up Job Categories

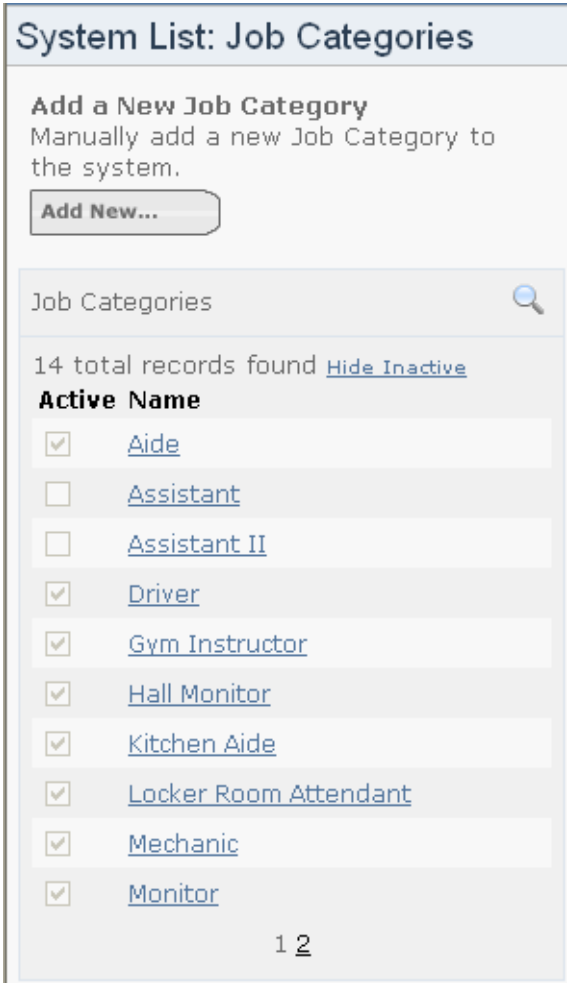
Job categories are used for setting up pay criteria within Employees records. They include the job category description and a pay code. These values will be available to you in the employee's records in the salary detail section.

Adding a Job Category

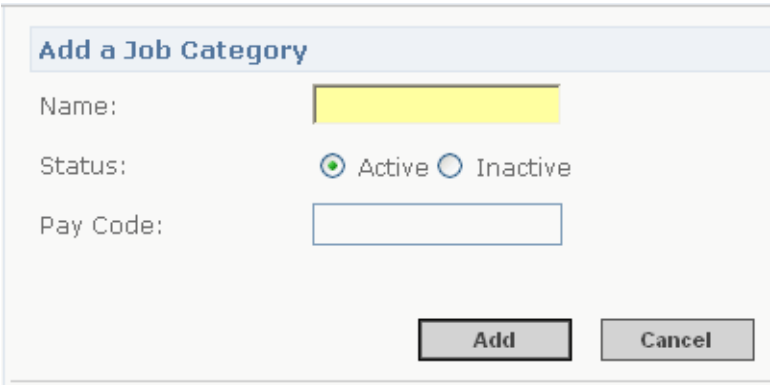
To add a job category:

Path:) **Admin > System Lists > Job Categories**

1. Follow the above path to display the System List: Job Categories screen.



2. Click Add New... to display a blank record.



3. Enter the name of the Job Category in the Name field.
4. Select **ACTIVE** for the status. Job categories which have been checked as Active will appear for selection in drop-down lists throughout the application.

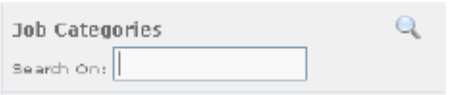
   You can optionally enter a Pay Code in the Code field. "Pay Code" is an optional category for reporting. This is a code associated with the specific job category.
5. Click Add to add the new job category.

Editing a Job Category

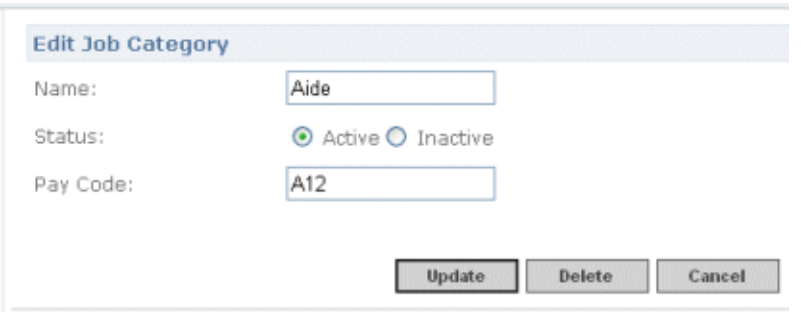
To edit a job category:

Path:) **Admin > System Lists > Job Categories**

1. Click to display the blank search panel.



2. Enter a job category in the **Search On** field. As you enter the job category, the system will display a list of job categories containing the text entered.
3. Select a job category to display the Edit Job Category screen.



4. You can change the name, status and pay code.
5. You can change the status to **ACTIVE** or **INACTIVE**.

   Job Categories which have been checked as **ACTIVE** will appear for selection in drop-down lists throughout the application.

   If you change an Active status to **Inactive**, the status change will take effect once the status change has been saved. The inactive certification name will no longer be actively tracked.

6. After you complete your changes, click to save your changes.

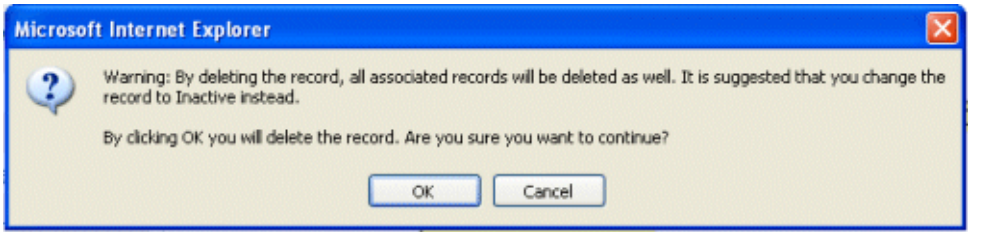
Deleting a Job Category

To delete a job category and pay code:

Path:) **Admin > System Lists > job Categories**

1. Click to display the blank search panel.

2. Enter a job category in the **Search On** field. As you enter the job category, the system will display a list of job categories containing the text entered.
3. Select an job category to display the Edit Job Category screen.
4. Click .


Microsoft Internet Explorer
Warning: By deleting the record, all associated records will be deleted as well. It is suggested that you change the record to Inactive instead.
By clicking OK you will delete the record. Are you sure you want to continue?
OK
Cancel

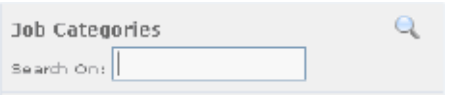
5. Click **OK** to delete the job category record. The record is deleted and its name is removed from the Job Categories list.

Deactivating a Job Category

To deactivate a job category:

Path:) **Admin > System Lists > Job Categories**

1. Click to display the blank search panel.



2. Enter a job category in the **Search On** field. As you enter the job category, the system will display a list of job categories containing the text entered.
3. Select an job category to display the Edit Job Category screen.
4. Click in the Status field.
5. Click to save your changes.

Showing Inactive Job Category Records in the Job Categories List

Only the "active" job category records display in the job category list. You have the option of displaying the "Active" and "Inactive" job category records in the job category list.

To show active and inactive job category records in the Job Categories list:

Path:) Admin > System Lists > Job Categories

- Click in the Job Categories screen to show the active and inactive records.

Setting Up Drug Test Types

Depending on the rules at your district, there may be several different tests that employees are required to take either on a random or fixed schedule. Either illicit or prescribed testing may be done.

This section is optiona.l If you already track drug test results in another place. There is no need to duplicate the effort and VersaTrans TripTracker does not

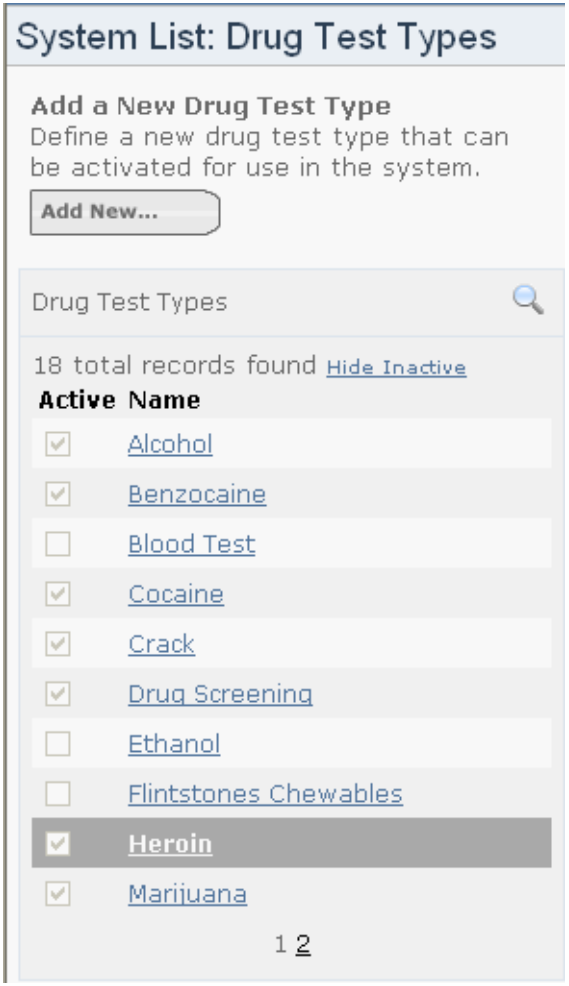
require this data to be entered to function properly.

Adding a Drug Test Type

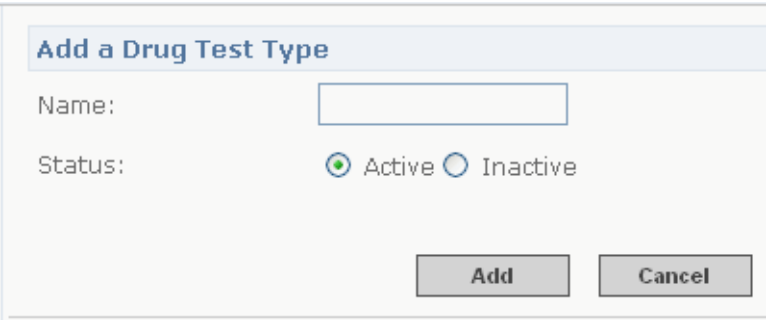
To add a drug test type:

Path:) **Admin > System Lists > Drug Test Types**

1. Follow the above path to display the System List: Drug Test Types screen.



2. Click Add New... to display a blank record.



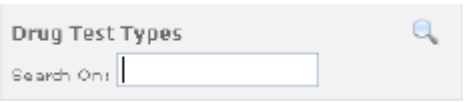
3. Enter the name of the drug test in the Name field.
4. Make sure that the Active check box is checked.
5. Click Add to add the new drug test type. The new drug test type appears on the Drug Test Types list.

Editing a Drug Test Type

To edit a drug test type:

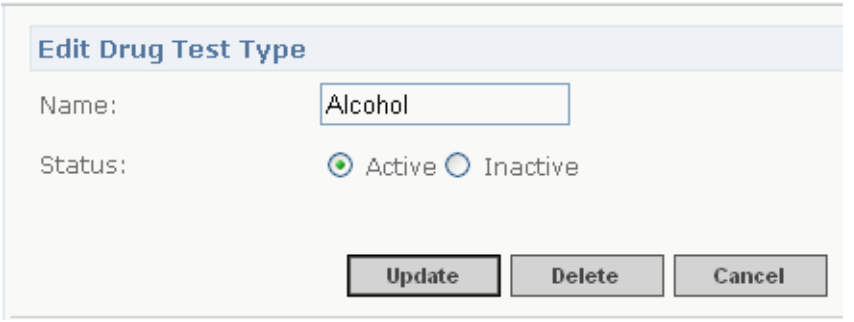
Path:) **Admin > System Lists > Drug Test Types**

1. Click to display the blank search panel.



2. Enter a drug test type in the **Search On** field. As you enter the drug test type, the system will display a list of job drug test types containing the text entered.

3. Select a drug test type to display the Edit Drug Test Type screen.



4. Make the desired changes in the associated fields.
5. You can change the status to **ACTIVE** or **INACTIVE**.

   Drug Test Types which have been checked as **ACTIVE** will appear for selection in drop-down lists throughout the application.

   If you change an Active status to **Inactive**, the status change will take effect once the status change has been saved. The inactive certification name will no longer be actively tracked.

6. After you complete your changes, click Update to save your changes.

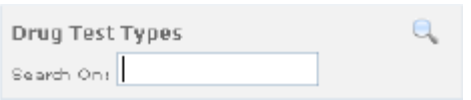
Deactivating a Drug Test Type

You can deactivate a drug test type so it doesn't display as an option in the future.

To deactivate a drug test type:

Path:) Admin > System Lists > Drug Test Types

1. Click to display the blank search panel.



2. Enter a drug test type in the **Search On** field. As you enter the drug test type, the system will display a list of job drug test types containing the text entered.
3. Select a drug test type to display the Edit Drug Test Type screen.
4. Click in the Status field.
5. Click to save your changes.

Showing Inactive Drug Test Type Records in the Drug Test Types List

Only the "active" drug test type records display in the drug test type list. You have the option of displaying the "Active" and "Inactive" drug test type records in the drug test type list..

To show active and inactive drug test type records in the Drug Test Types list:

Path:) Admin > System Lists > Drug Test Types

- Click in the Drug Test Types screen to show the active and inactive records.

Working with Employee Records

Now that you have your certifications records established and set up the employee types (with the assigned certifications records), you are ready to enter employee records themselves. You must complete the certification and employee type records (see, *Setting Up Certification Records* on page 111 and *Setting Up Employee Types* on page 122) before you can add the employee records themselves.

Adding an Employee Record

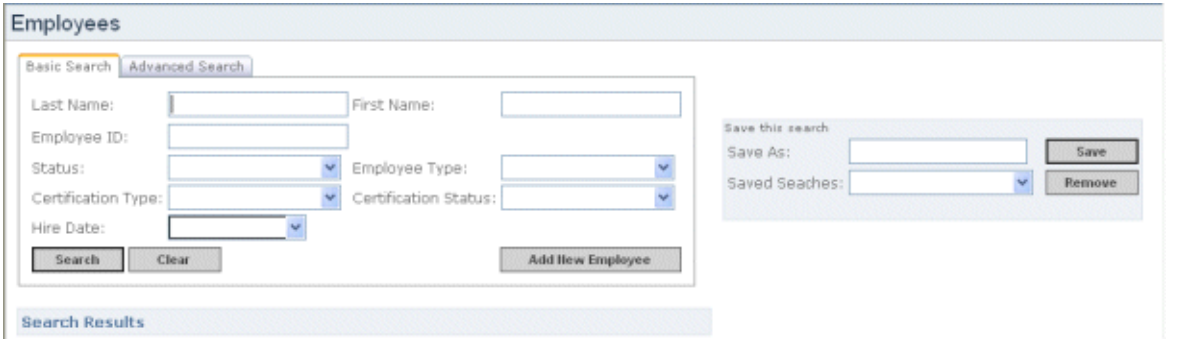
Employees may include all of the transportation department workers who have responsibilities for trips as well as other district workers as needed.

Note: *You can import the* ***Employee*** *data if you have files with a fixed or delimited format. See, Using the Import Utility on page 267.*

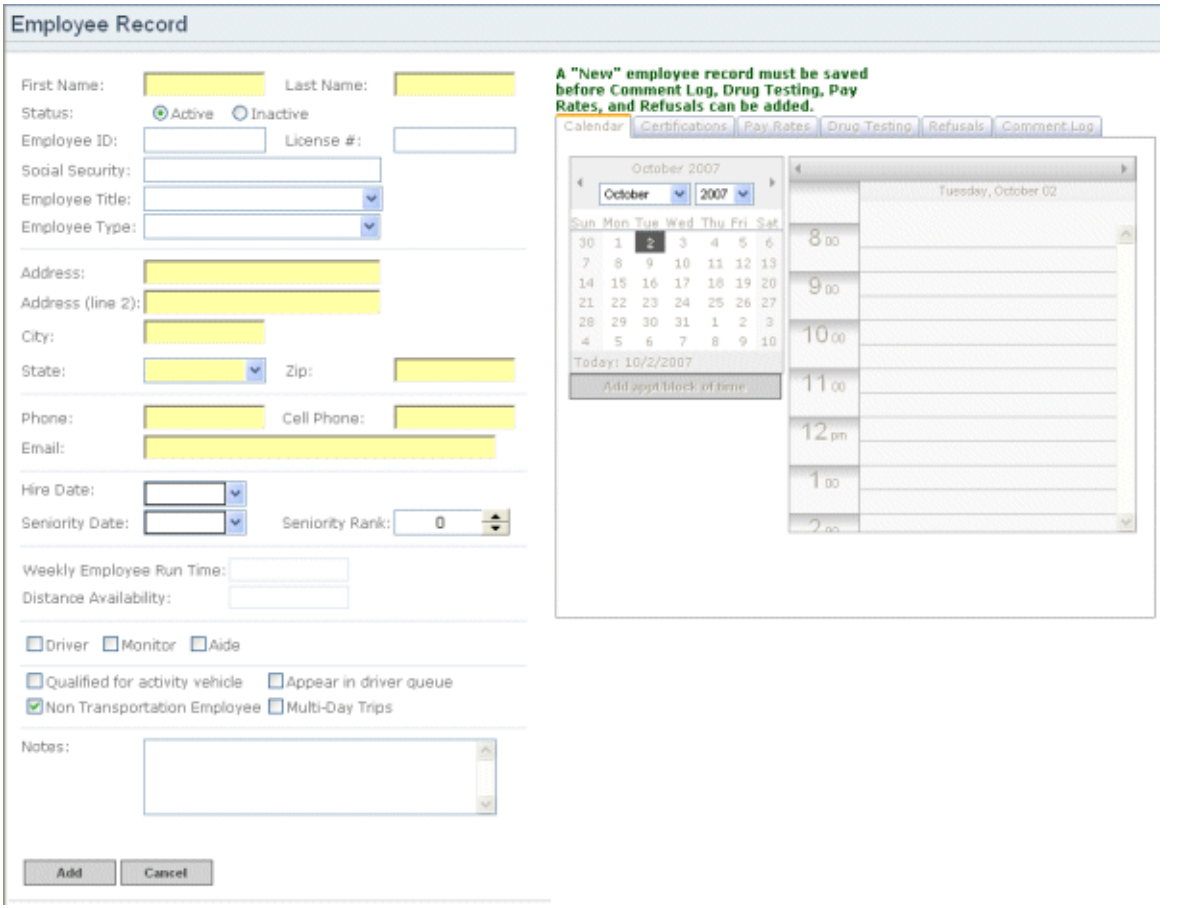
To add an employee record:

Path:) **Admin > Employees**

1. Follow the above path to display the Employees screen.



2. Click Add New Employee to display a blank Employee Record screen.



Note: *If you have VersaTrans RP and VersaTrans FleetVision, the building, vehicle, and employee data is shared. Any edits, adds, or deletes that are made here will impact your VersaTrans RP and VersaTrans FleetVision data.*

3. Complete the blank fields in this screen including the tabs, until all of the information your organization requires is complete. Most of these fields are self-explanatory. If you have questions about the appropriate entries for this screen, see the field descriptions below.

   Note: *A "new" employee record must be saved before the tabs can be accessed and information added.*

   First Name/Last Name
   Type the employee's name in the appropriate fields.

   Employee ID
   Type the employee's ID in this field.

   License #
   Type the employee's drivers license number in this field.

   Social Security #
   Type the employee's social security number in this field.

   Employee Title
   Use the drop-down list to select the employee title for this employee. The employee title entries you have made display in this list.

   Employee Type
   Use this drop-down list to select the employee type for this employee. The employee type entries you have made display in this list.

   Hire Date
   Select the employee's hire date from the drop-down calendar.

   Seniority Date
   This is the date seniority tracking begins. If you want this employee to use a different date other than the date of hire for seniority purposes, select that date from the drop-down calendar.

   Seniority Rank
   If you want to list employees in a particular order based on seniority, enter this employee's number in this field.

Weekly Employee Run Time
The number of hours per week that the driver is scheduled for regular runs.

Distance Availability
This is the maximum trip distance that a driver will accept. Distance availability is used in automated driver assignment.

Active/Inactive
Employees with an Active status will appear for selection in drop-down lists throughout the application.

Driver/Monitor/Aide
Check the boxes that apply to the employee.

Qualified for Activity Vehicle
Check this box to Qualify the driver, monitor, or aide to be assigned to a field trip.

Appear in Driver Queue
Check this box to include this employee in the list of drivers. If an employee appears in the driver queue, the driver will be available for auto-assignment.

Non Transportation Employee
Check this box if the employee is not involved in transportation.

Multi-Day Trips
Checking this box indicates that a driver is available for multi-day trips. This information is used in automated driver assignment.

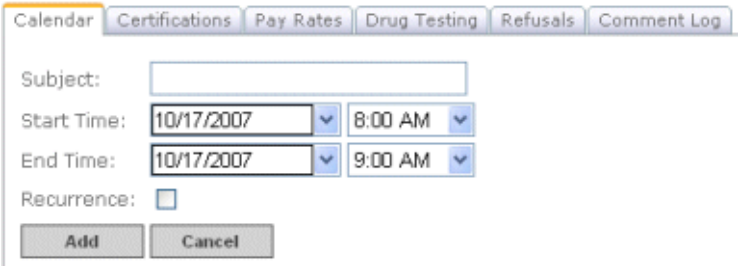
Entering a Range of Time for When an Employee is Unavailable

To enter a range of time for when an employee is unavailable:

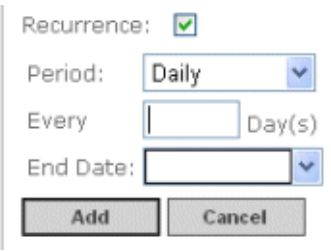
Path:) **Admin > Employees**

1. Follow the above path to display the Employees screen.

2. Perform a search to locate the employee whose record you want to work with. See, *Finding and Editing an Employee's Record Using the Basic Search* on page 151.
3. Click **Add appt/block of time** to enter a range of time for when an employee is unavailable.

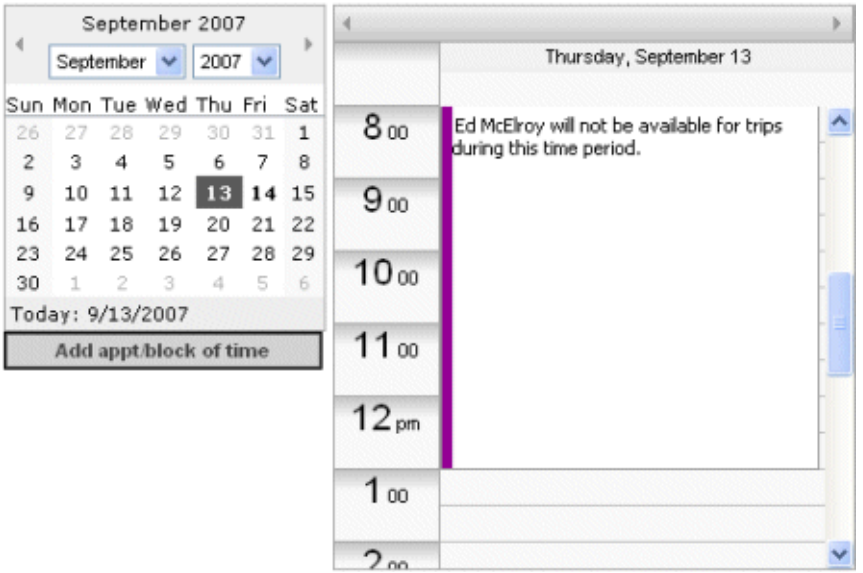


4. Type the reason for an employee not being available in the **Subject** field.
5. Use the drop-down calendar to select the start/end dates and times.
6. Check **RECURRENCE** when you want to log recurring unavailable time for an employee.



7. Enter the Period (Daily, Every Weekday, Weekly, Monthly, or Yearly).
8. If you selected Daily or Every Weekday, enter the number of days in the Every __ Day(s) field. Weekly, enter the number of weeks. Monthly, enter the number of months. Yearly, enter the number of years.

9. Enter the date or select the date the recurrence will end in the End Date field.
10. Click Add to add the recurrence to the calendar.
11. Click Add and the selected dates and times are blocked off on calendar.


September 2007
September
2007
Sun Mon Tue Wed Thu Fri Sat
26 27 28 29 30 31 1
2 3 4 5 6 7 8
9 10 11 12 13 14 15
16 17 18 19 20 21 22
23 24 25 26 27 28 29
30 1 2 3 4 5 6
Today: 9/13/2007
Add appt/block of time
Thursday, September 13
8 00
9 00
10 00
11 00
12 pm
1 00
Ed McElroy will not be available for trips during this time period.

Note: *The dates and times that an employee is unavailable is used when assigning a driver to a trip. If the trips falls within a driver's unavailable time, the user will get a message that the driver is unavailable.*

Viewing & Updating an Employee's Certification Information

Certification information is assigned to employee types, see *Adding an Employee Type and Associating Certifications* on page 122. Different employee types may require different certifications. For example, a driver may be

required to have CPR, Mountain Driving, and First Aid certifications. The Certifications tab allows you to view employee certification information (i.e. Certifications, Required, Completion Date, Expiration Date, and Status) relating to that employee's type. You can also edit the completion and expiration dates for that employee's certification.

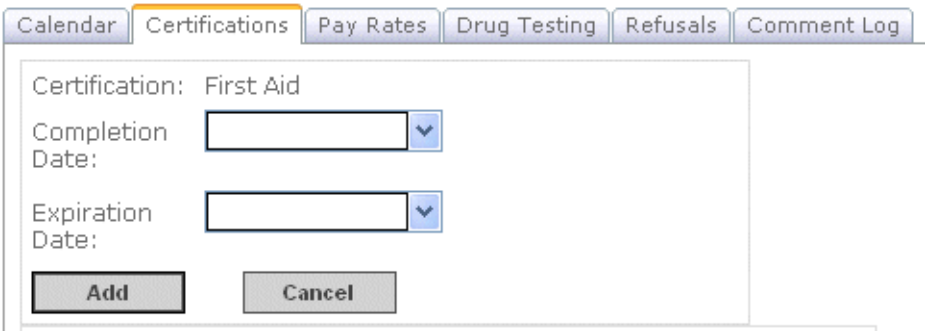
To view and update an employee's certificating information:

Path:) Admin > Employees

1. Follow the above path to display the Employees screen.
2. Perform a search to locate the employee whose record you want to work with. See, *Finding and Editing an Employee's Record Using the Basic Search* on page 151.
3. Click Certifications to display the employee's certification information.

When you added a new certification (see, *Adding Certification Records* on page 111) you entered a number of look ahead days. When the employee's certification is within that look ahead number of days, the system highlights the entry in this screen in yellow and displays the *Coming Due* label in the Status column. If the number of look ahead days is passed, the Status column entry reads *Overdue* and the system highlights the entry in red. Certifications that are missing say *Missing* in the Status colum and are also displayed in red. When you update/edit the certification entries for the employee, the red highlight disappears.

4. Click Edit for the certification that you want to update.



5. Either enter a completion and expiration date or click to select the dates from the calendar.
6. Click Add to update the selected certification's completion and expiration dates.

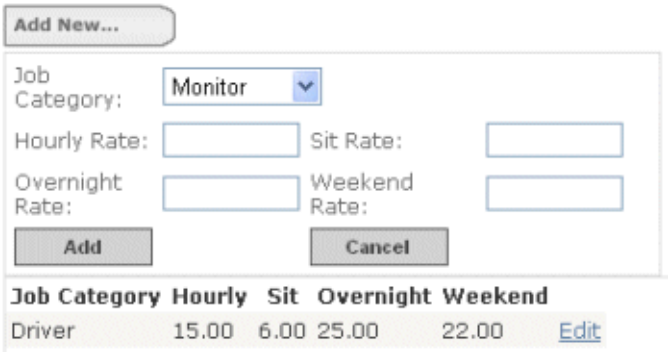
Entering an Employee's Pay Rate Information

To enter an employee's pay rate information:

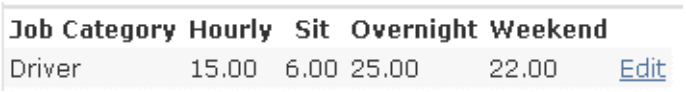
Path:) Admin > Employees

1. Follow the above path to display the Employees screen.

2. Perform a search to locate the employee whose record you want to work with. See, *Finding and Editing an Employee's Record Using the Basic Search* on page 151.
3. Click Pay Rates. and then click Add New..., the system displays the Pay Rate Entry box.



4. Select the employee's job category from the drop down list.
5. Enter the appropriate pay rate amounts in each of the rate fields.
6. Click the Add button. The pay rates entered are displayed.



7. Click Edit to update the employee's pay rate.

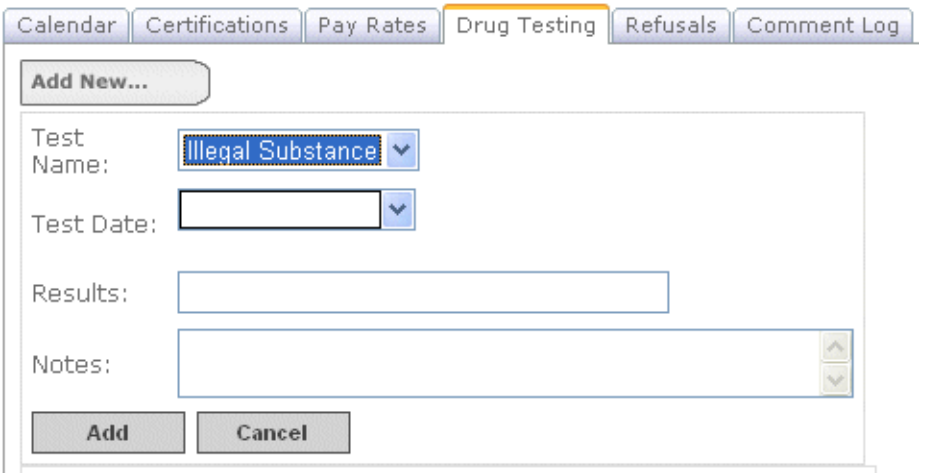
Entering an Employee's Drug Testing Information

To enter an employees drug testing information:

Path:) Admin > Employees

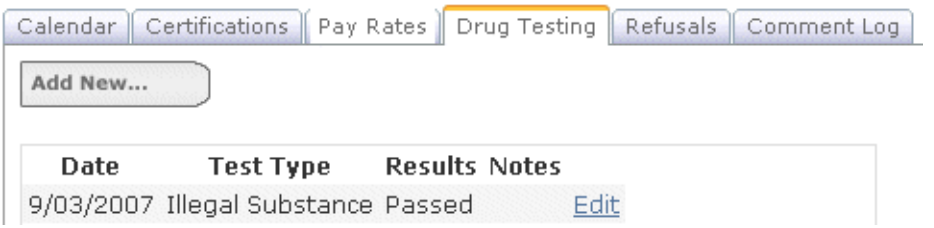
1. Follow the above path to display the Employees screen.

2. Perform a search to locate the employee whose record you want to work with. See, *Finding and Editing an Employee's Record Using the Basic Search* on page 151.
3. Click Drug Testing and then click Add New..., the system displays the Drug Testing Entry box.



4. Select the test name from the drop down list. See, *Setting Up Drug Test Types* on page 133.
5. Either enter a test date or click to select a date from the calendar.
6. Enter the appropriate pay rate amounts in each of the rate fields.
7. Enter the results and notes in the corresponding fields.

8. Click the Add button. The drug test information is displayed.



9. Click Edit to update the drug test information.

Viewing an Employee's Trip Refusal Information

To view an employee's trip refusal information:

Path:) Admin > Employees

1. Follow the above path to display the Employees screen.
2. Perform a search to locate the employee whose record you want to work with. See, *Finding and Editing an Employee's Record Using the Basic Search* on page 151.
3. Click Refusals to review the employee's field trip refusals. This is not applicable when you enter an employee initially, since this tab displays trips this employee has refused. You cannot enter trip refusals here.

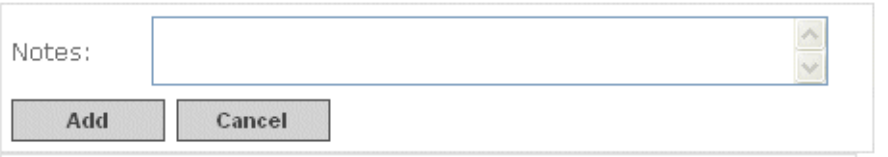
Using the Comment Log

To use the comment log:

Path:) Admin > Employees

1. Follow the above path to display the Employees screen.

2. Perform a search to locate the employee whose record you want to work with. See, *Finding and Editing an Employee's Record Using the Basic Search* on page 151.
3. Click Comment Log and then click Add New..., the system displays the Comment Entry box.



4. Enter your comments into the Notes field and click Add. The comments entered are displayed.

Finding & Editing an Employee's Record

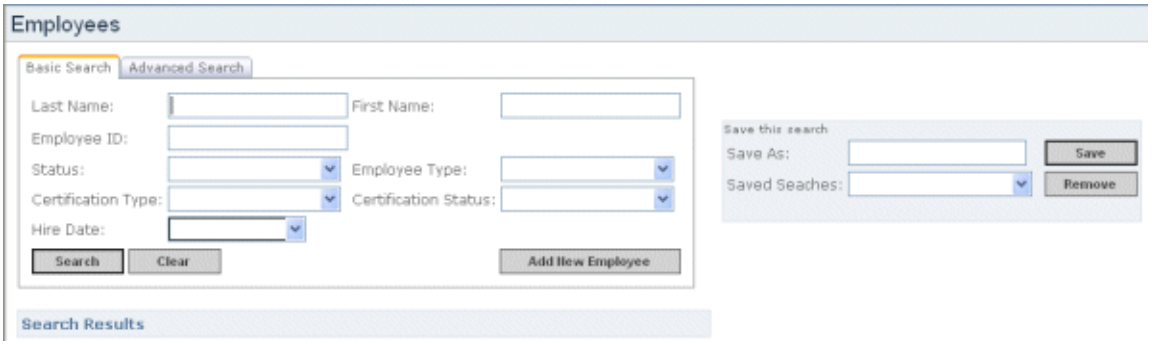
You can use the basic or advanced search methods to find an employee's record and edit that employee's record in the VersaTrans TripTracker system. Finding an employee's record largely depends upon what criteria you know when you begin the search.

Finding and Editing an Employee's Record Using the Basic Search

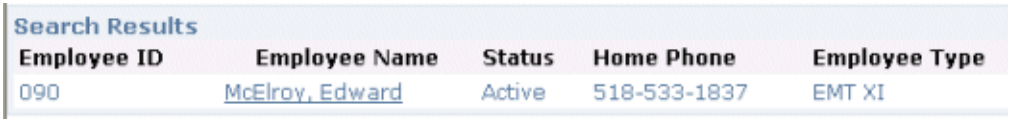
To find and edit an employee's record using the basic search:

Path:) **Admin > Employees**

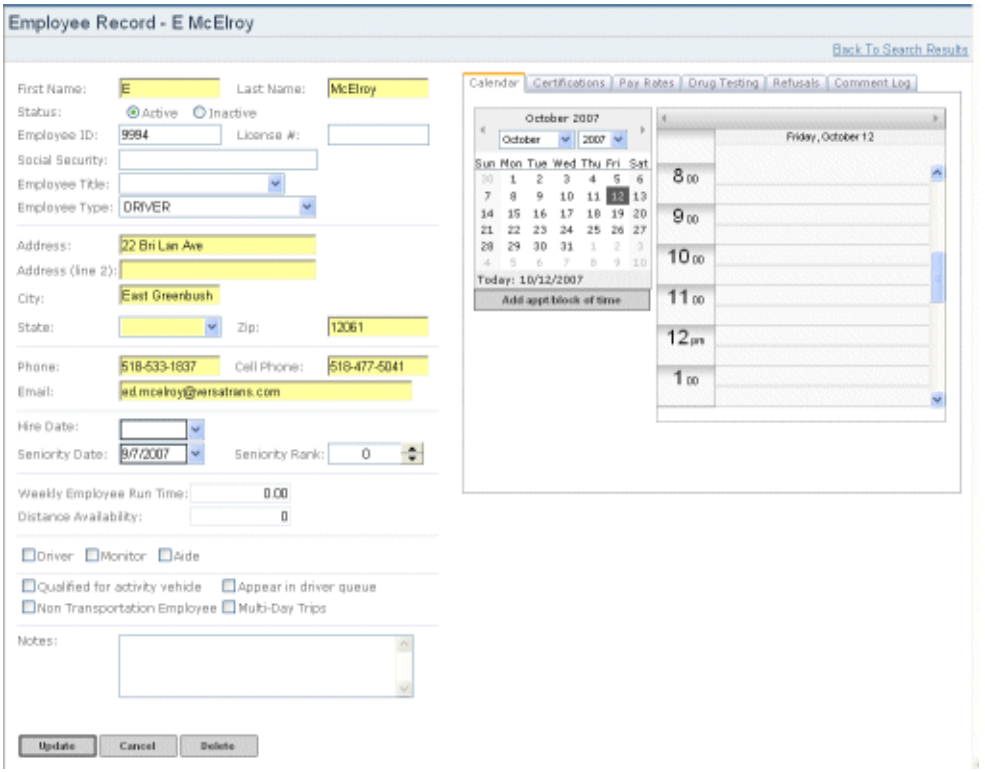
1. Follow the above path to display the Employees screen.



2. Click the Basic Search tab.
3. Clicking the Search button without entering information will display all employee's records.
4. For a specific employee, enter the information or select the employee information from drop-down lists.
5. Click Search to display the employee's search results.



6. Click on the Employee name to display the Employee Record screen.



7. Click Cancel to return to the Employees Screen

   OR,

8. You can edit the employee record by either entering new information or selecting information from drop-down lists.
9. When you are finished editing the employee record click Update.
10. Click Cancel to return to the Employees Screen.

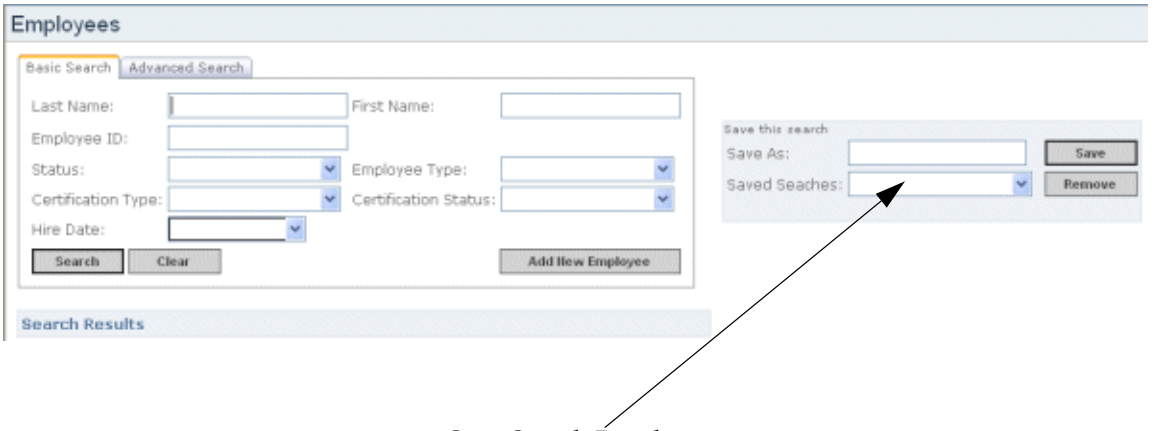
Saving an Employee Search & Using a Saved Employee Search

You can save any number of employee searches and they will be added to a list for later use.

To save an employee search and then use the saved search:

Path: Employee Search

1. Follow the above path to display the Employee's Search screen.
2. Click the Basic Search tab.
3. Set up and run an employee search as described in *Finding & Editing an Employee's Record* on page 150*Finding & Editing an Employee's Record*.



4. In the Save Search panel, enter a name for the search in the Save as field.
5. Click Save. The search is added to a list accessible from the Saved searches drop-down button.
6. Click the Saved Searches drop-down button to display a list of saved searches.

7. Select the desired search from the list and click Search

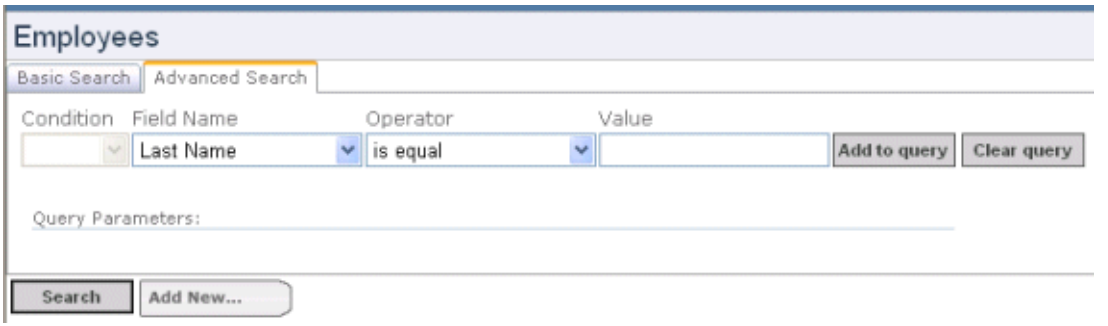
Finding & Editing an Employee's Record Using the Advanced Search

If you want to enter more specific criteria, use the advanced search. The advanced search gives you more options in choosing criteria by introducing an operator, such as is equal, not equal, less than, and is between.

To find and edit an employee's record using the advanced search:

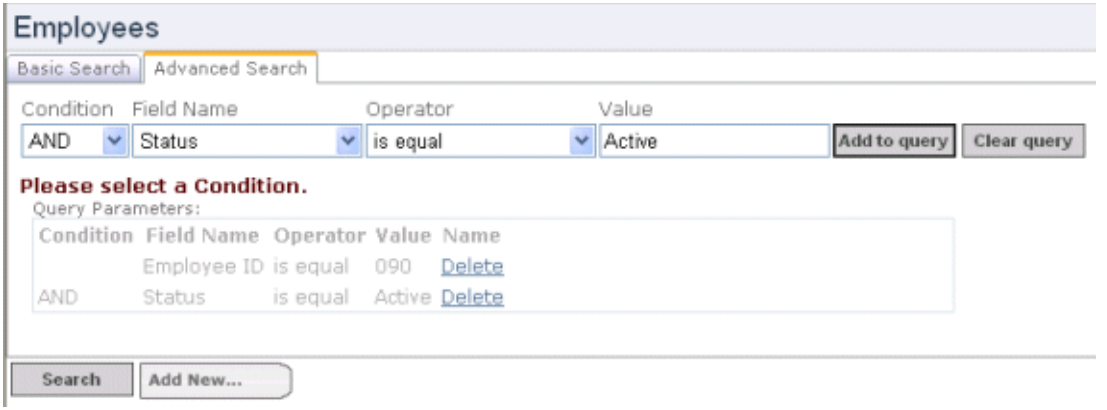
Path:) **Admin > Employees**

1. Follow the above path to display the Employee's Search screen.
2. Click the **ADVANCED** search tab.

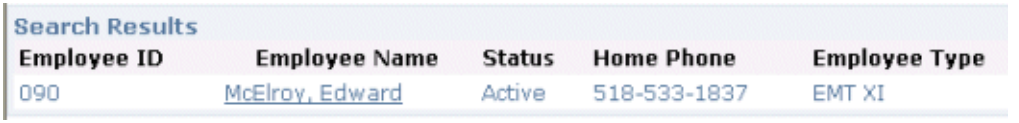


3. Select the field you want to search on from the **FIELD NAME** drop-down list.
4. Select an operator for this criterion from the Operator drop-down list. Operators include: **IS EQUAL**, **NOT EQUAL**, **LESS THAN**, **LESS THAN OR EQUAL**, **GREATER THAN**, **GREATER THAN OR EQUAL**, **IS BETWEEN**, **IS IN**, and **IS NOT IN**.

5. Click Add to query. The Condition field becomes active allowing you to select a condition (AND or OR) and if desired, continue entering criteria to the query. The following is an example of a query with 2 sets of criteria.



6. When you are finished entering criteria, click Search. The Search Results panel displays the employee(s) that match the query.



7. Click on the Employee name to display the Employee Record screen.
8. Click Cancel to return to the Employees Screen

   OR,

9. You can edit the employee record by either entering new information or selecting information from drop-down lists.
10. When you are finished editing the employee record click Update.
11. Click Cancel to return to the Employees Screen.

Specifying Driver Assignment Rules & Creating a Template

The Driver Assignment Rules screen allows you to select rules for ordering driver assignment lists (i.e. Driver Pick List) based on any one or a combination of rules. These rules can be saved as a Driver Pick List template that can be used to set rules for determining driver assignment lists in the future.

For example, a district wants to award trip assignments by hours previously awarded, with rotation, but also factor in refusals. According to their procedures, 4 refusals = 1 trip, and trips average 4 hours, so for every 4 refusals, 4 hours are added to their awarded hours counts (as if they had been awarded a trip).

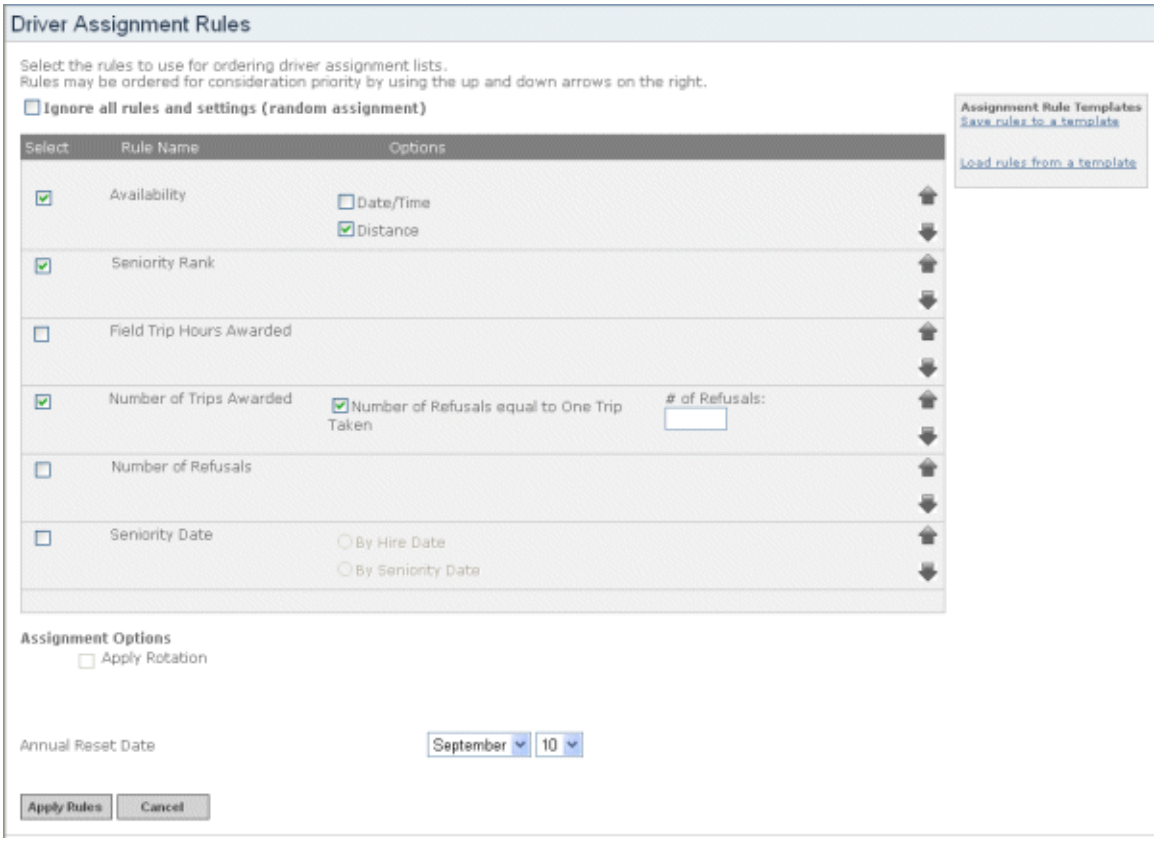
Note: ***Multiple Driver Assignment templates can be created. However, there is only one set of Driver Assignment rules in use for VersaTrans TripTracker at one time. The default templates can be changed, but whichever is the active set of rules, those are the set of rules that will be used.***

Specifying Driver Assignment Rules

To specify driver assignment rules:

Path:) **Admin > Driver Assignment Rules**

1. Follow the above path to display the Driver Assignment Rules screen.



2. Select the rules to use for ordering driver assignment lists.
3. Click to move a rule up or down on the list. The higher the rule is on the list, the higher the priority that rule will receive.

Ignore all rules and setting (random assignment)

Allows you to choose "No Rules" as the only driver assignment rule.

Availability
Allows you to select **Date/Time** and/or **Distance** availability to be used when ordering driver assignment lists. Employee schedule and distance availability are entered in the employee record, see *Entering a Range of Time for When an Employee is Unavailable* on page 142.

Seniority Date
Hire Date or **Seniority Date** sorts the entries in the list by the dates you entered in the employees record. Hire Date and Seniority Date are entered in the employee record, see *Adding an Employee Record* on page 139.

Number of Refusals
When checked, the number of trip refusals will be taken into account when ordering driver assignment lists.

Field Trip Hours Awarded
Sorts the entries based on the amount of field trip hours each driver in the list has already taken. The driver with the most hours displays at the bottom.

Number of Trips Awarded
Used in totaling trips that will be used when ordering driver assignment lists.

Seniority Rank
Seniority Rank is entered in the employee record, see *Adding an Employee Record* on page 139.

Assignment Option (Apply Rotation)
A driver will be moved to the bottom of the list once a trip is taken.

Annual Reset Date
Select a date that the system should use to reset the driver assignment list basically giving the driver a clean slate for the upcoming school year. The following fields are reset:

- Field Trip Hours Awarded
- Number of Trips Awarded

- Number of Refusals

All of the rules are then used again to resort the drivers.

4. Click Apply Rules when you have finished selecting driver assignment rules.

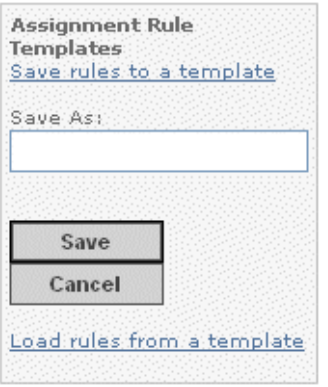
Creating a Template for Driver Assignment Rules

To create a template for driver assignment rules:

Path:) Admin > Driver Assignment Rules

1. Follow the above path to display the Driver Assignment Rules screen.
2. In the top right-hand corner of the screen is the Assignment Rule Templates box.

3. Click Save rules to a template and the Save As field displays.



4. In the Save As field type a name for the template.
5. Click Save to save the template for future use.

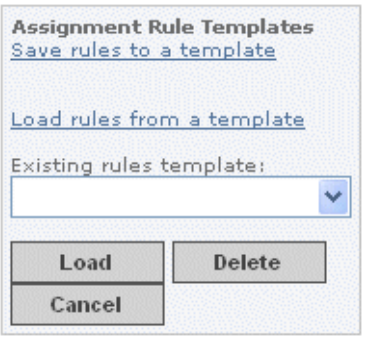
Loading Rules from a Driver Assignment Template

To load rules from a driver assignment template:

Path:) **Admin > Driver Assignment Rules**

1. Follow the above path to display the Driver Assignment Rules screen.
2. In the top right-hand corner of the screen is the Assignment Rule Templates box.

3. Click Load rules from a template and the Existing rules template field displays.



4. Select the template containing the rules that you want to use.
5. Click Load and the rules contained in the template are loaded. The driver assignments lists will be ordered according to the new rules.

Setting Up Approval Paths

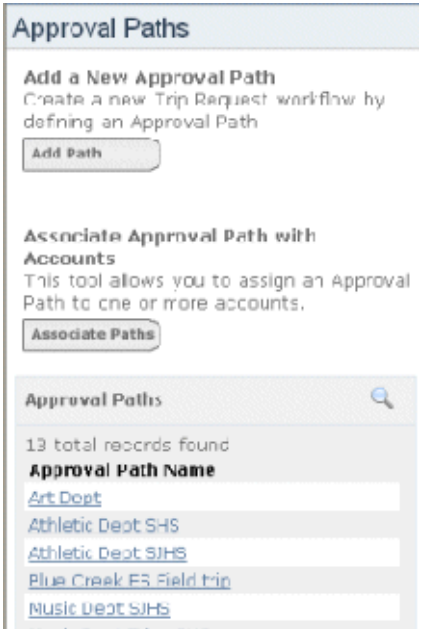
When a trip request is submitted, there may be several individuals at various levels responsible for reviewing the request to determine whether it should be approved. Some districts have one level of approval, where once a trip is approved by an individual it will immediately go into the scheduling phase. While other districts require that there are several levels of approval required before a trip is scheduled.

Adding a New Approval Path

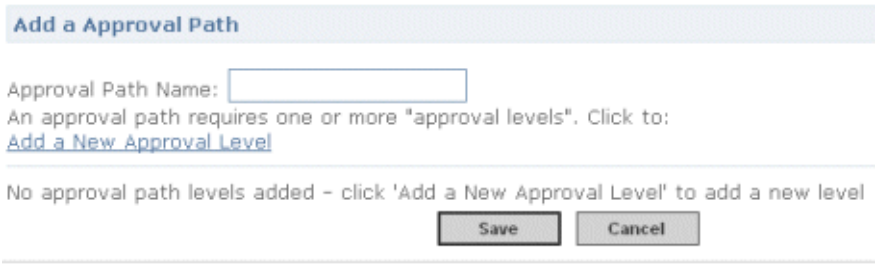
To add a new approval path:

Path:) **Admin > Approval Paths**

1. Follow the above path to display the Approval Paths screen.


Approval Paths
Add a New Approval Path
Create a new Trip Request workflow by defining an Approval Path
Add Path
Associate Approval Path with Accounts
This tool allows you to assign an Approval Path to one or more accounts.
Associate Paths
Approval Paths
13 total records found
Approval Path Name
Art Dept
Athletic Dept SHS
Athletic Dept SJHS
Blue Creek ES Field Trip
Music Dept SJHS

2. Click **Add Path** .

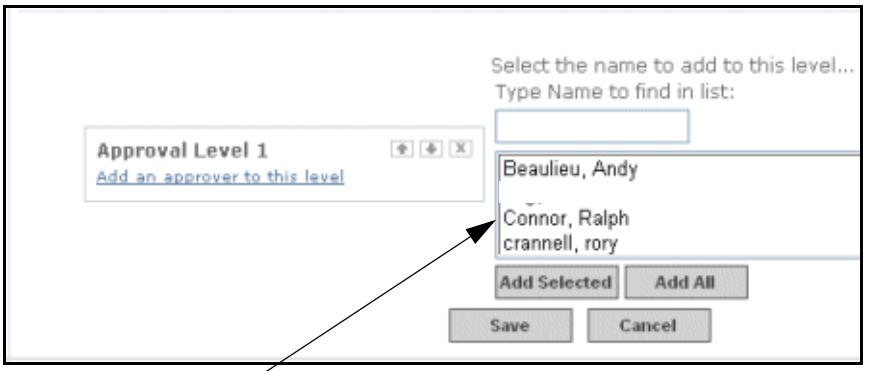

Add a Approval Path
Approval Path Name:
An approval path requires one or more "approval levels". Click to:
Add a New Approval Level
No approval path levels added – click 'Add a New Approval Level' to add a new level
Save
Cancel

3. Enter the name of the Approval Path (i.e.: Athletic Dept., Music Dept. etc.).

4. Click Add a New Approval Level .

Add a Approval Path
Approval Path Name: Music Dept.
An approval path requires one or more "approval levels". Click to:
Add a New Approval Level
Approval Level 1
Add an approver to this level
Save
Cancel

5. Click Add an approver to this level



This is a list of users that belong to user groups who have trip approval privleges.

6. Start typing a name into the blank name field. As the system finds a match, it displays those matches. You can select a single name by clicking on the name or select multiple names by using the **CTRL** key

   When you are finished selecting names, click Add Selected to add only the selected name(s) or click Add All to add all the names.

You can repeat steps 5 & 6 to add as many approvers and approval levels as needed for your approval path process.

7. Click Save to save the approval path. The next step is to assign an approval path to an account (see, *Assigning an Approval Path to an Account* on page 165).

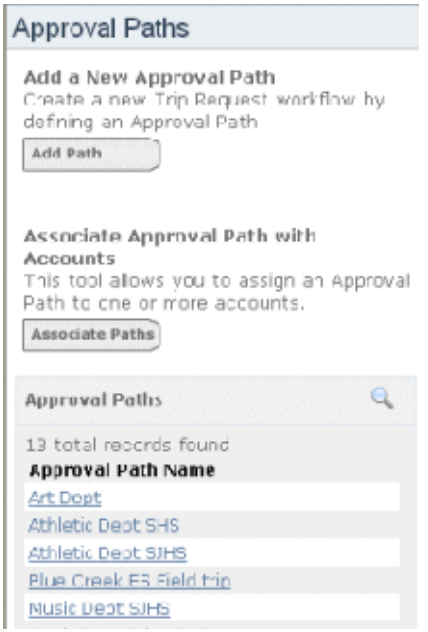
Assigning an Approval Path to an Account

The next step in the approval path process is to assign approval paths to one or more accounts. This step is optional. If you do not want to assign accounts by way of the Approval Path process, you can associate an account to a default approval path from within an individual account record. See, *Adding Account Records* on page 64.

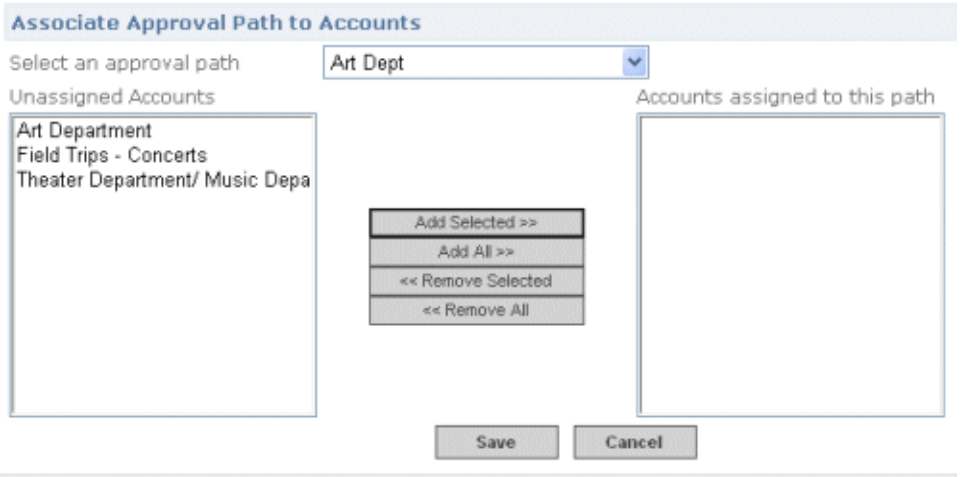
Path:) **Admin > Approval Paths**

To assign an approval path to an account:

1. Follow the above path to display the Approval Paths screen.


Approval Paths
Add a New Approval Path
Create a new Trip Request workflow by defining an Approval Path
Add Path
Associate Approval Path with Accounts
This tool allows you to assign an Approval Path to one or more accounts.
Associate Paths
Approval Paths
13 total records found
Approval Path Name
Art Dept
Athletic Dept SHS
Athletic Dept SJHS
Blue Creek ES Field trip
Music Dept SJHS

2. Click Associate Paths .



3. Use the drop-down button to display a list of Approval Paths and select an approval path from the list.

   On the left side of the **Associate Approval Path to Account** screen are a list of **Unassigned Accounts**. This list contains all active accounts that are not currently associated with an approval path.

4. You can select a single account by clicking on the account or select multiple accounts by using the **CTRL** key.

   When you are finished selecting accounts, click Add Selected to add only the selected name(s) or click Add All to add all the names.

   The selected accounts are moved from the **Unassigned Accounts** to the **Accounts Assigned to this path**.

5. When you are finished assigning accounts to an approval path, click Save .

Chapter 3

Working with Trip Requests

Topics In This Chapter:

Before You Begin, 170
Requesting a Trip, 175
Finding a Trip Request, 221

Before You Begin

In order to complete all the stages in the trip request process and receive email messaging, the following information should be entered in the following order before the trip request process begins:

- *Setting the System Options* on page 9
- *Setting Up Email* on page 251
- *Setting Up Building Records* on page 38
- *Setting Up the Financial Records* on page 45
- *Setting Up Trip Locations* on page 79
- *Setting Up Trip Types* on page 86
- *Working with Employee Records* on page 139
- *Setting Up Approval Paths* on page 162
- *Setting Up Accounts* on page 64
- *Specifying Driver Assignment Rules & Creating a Template* on page 156
- *Adding a Vehicle Record* on page 97
- *Setting Up User Groups & Users* on page 236

Email Messaging & Trip Request Stages

One of the most important features of VersaTrans TripTracker is email messaging. VersaTrans TripTracker messaging depends upon the following:

- Setting your email options properly. See*Setting Up Email* on page 251*Setting Up Email* for these settings.
- Having your message templates set up. See, *Setting Up Email Message Templates*, on page 255 for a description of this process.

Depending upon the stages selected for each recipient in your email option settings, the system will potentially send the following emails:

Table 1.

Requester
Trip Submitted
Trip Approved/Rejected
Trip Cancelled
Trip Scheduled
Trip Billed
Trip Closed

Table 2.

Account Contact
Trip Submitted
Trip Approved
Trip Cancelled
Trip Billed
Trip Closed
Budget Alerts
Trip Payments

Table 3.

Approver
Trip To Approve
Trip Cancelled

Table 4.

Scheduler
Trip To Schedule
Trip Cancelled

Table 5.

Billing Clerk
Trip ready for Billing
Trip Cancelled

Table 6.

Driver/Monitor/Aide
Trip Scheduled To Them
Trip Cancelled

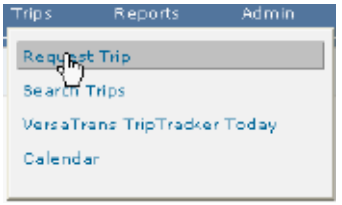
Ways to Initiate a Trip Request

In order to facilitate the initiation of trip requests when it is most needed, we have provided a way to access the Trip Request screen from the following areas of VersaTrans TripTracker:

Application Header

Click the Request a Trip button to initiate a trip request.

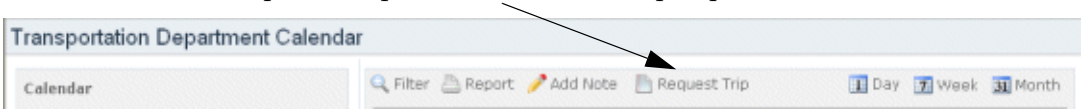
Main Menu

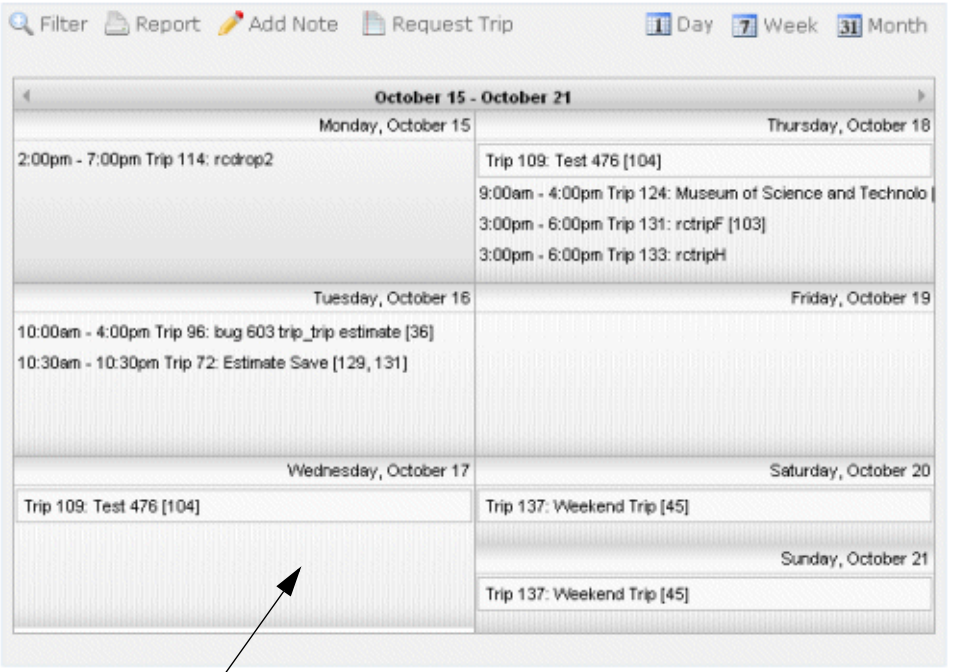


Click the Request Trip link to initiate a trip request.

Transportation Department Calendar

Click the Request a Trip Button to initiate a trip request.



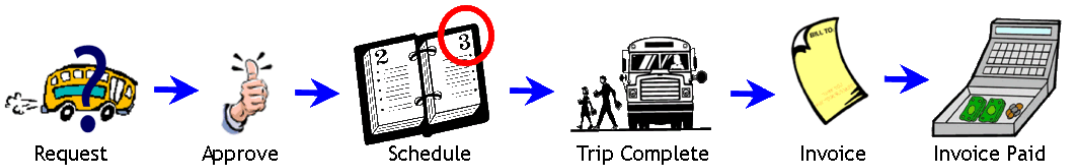

Filter
Report
Add Note
Request Trip
Day
Week
Month
October 15 - October 21
Monday, October 15
2:00pm - 7:00pm Trip 114: rcdrop2
Thursday, October 18
Trip 109: Test 476 [104]
9:00am - 4:00pm Trip 124: Museum of Science and Technolo
3:00pm - 6:00pm Trip 131: rctripF [103]
3:00pm - 6:00pm Trip 133: rctripH
Tuesday, October 16
10:00am - 4:00pm Trip 96: bug 603 trip_trip estimate [36]
10:30am - 10:30pm Trip 72: Estimate Save [129, 131]
Friday, October 19
Wednesday, October 17
Trip 109: Test 476 [104]
Saturday, October 20
Trip 137: Weekend Trip [45]
Sunday, October 21
Trip 137: Weekend Trip [45]

Double- click on a day in the calendar to initiate a trip request.

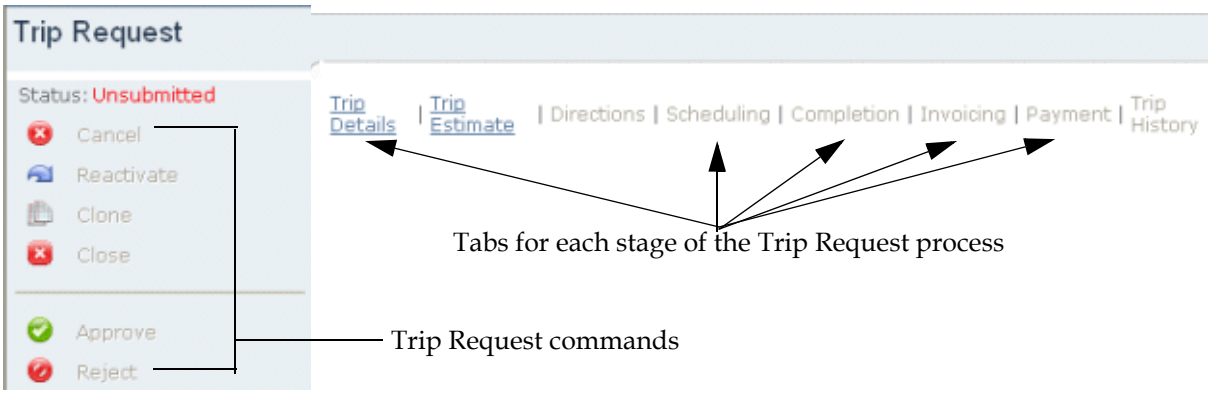
Users assigned request permissions can request a trip by selecting a day from the weekly or monthly calendar or the time of day from the daily calendar view. Selecting a day and time will auto populate the trip data field and departure time field.

Requesting a Trip

The Trip Request process consists of a number of stages: Trip Request Submitted, Trip Approved, Trip Estimates, Directions (optional), Trip Scheduled, Trip Complete, Trip Billed/Invoiced, and Trip Payment.



The Trip Request screen (below) contains the tabs and commands that allow you to work your way through each stage of the trip request process. Different tabs and commands become active as you progress through each stage.



The following trip request tasks are covered in this section:

- *Adding a Trip Estimate to a Trip Request, 176*
- *Submitting a Trip Request, 187*
- *Sending Out a Trip Request for Approval, 193*
- *Adding Directions to a Trip Request (Optional), 196*
- *Scheduling a Trip, 199*
- *Completing a Trip, 203*
- *Invoicing a Trip and Printing/Saving the Invoice, 205*

Adding a Trip Estimate to a Trip Request

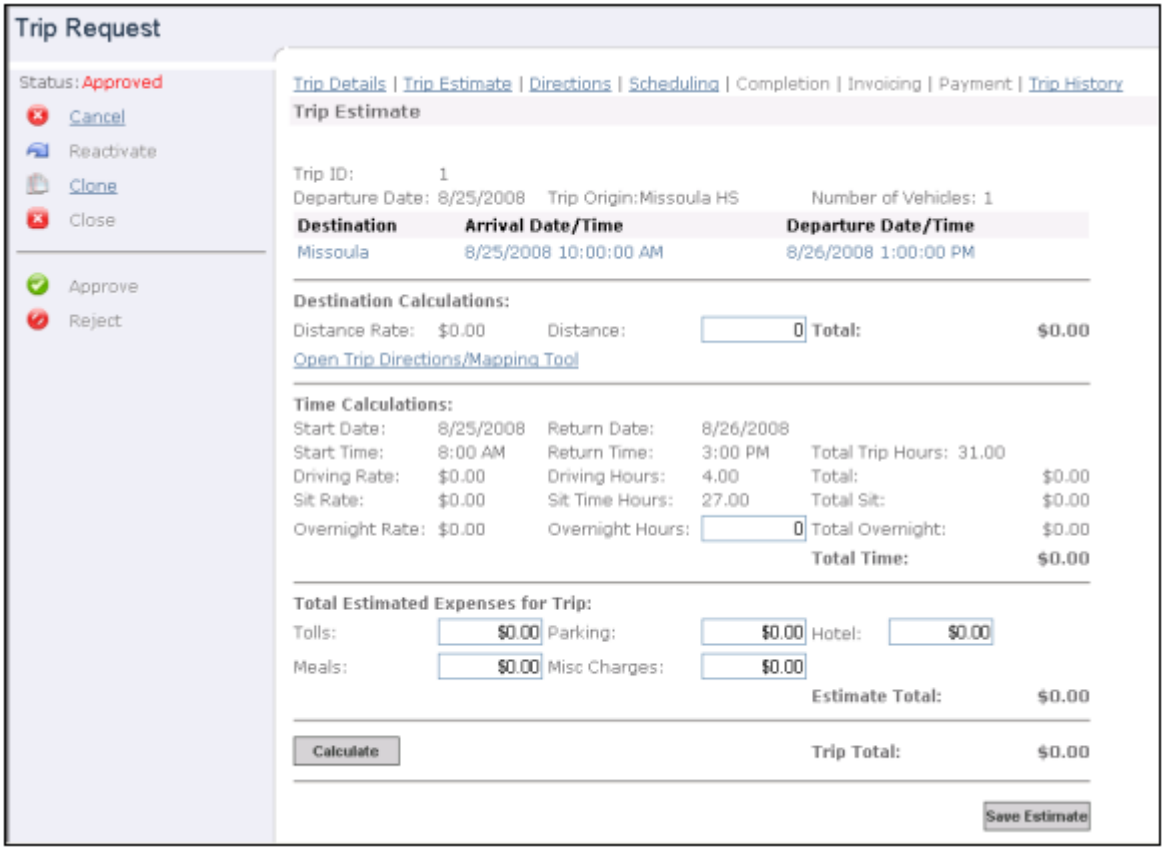
The estimating function uses the account information you have already entered to give you an idea of the trip cost. The more estimated expenses you enter, the more precise the trip estimate will be.

To add a trip estimate to a trip request:

Path:) Trips > Search Trips

1. Locate a trip request (see, *Finding a Trip Request* on page 221) to display the Trip Request - Trip Details screen.

2. Select Trip Estimate to display the Trip Request - Trip Estimate screen.


Trip Request
Status: Approved
Cancel
Reactivate
Clone
Close
Approve
Reject
Trip Details | Trip Estimate | Directions | Scheduling | Completion | Invoicing | Payment | Trip History
Trip Estimate
Trip ID: 1
Departure Date: 8/25/2008 Trip Origin: Missoula HS Number of Vehicles: 1
Destination Arrival Date/Time Departure Date/Time
Missoula 8/25/2008 10:00:00 AM 8/26/2008 1:00:00 PM
Destination Calculations:
Distance Rate: $0.00 Distance: 0 Total: $0.00
Open Trip Directions/Mapping Tool
Time Calculations:
Start Date: 8/25/2008 Return Date: 8/26/2008
Start Time: 8:00 AM Return Time: 3:00 PM Total Trip Hours: 31.00
Driving Rate: $0.00 Driving Hours: 4.00 Total: $0.00
Sit Rate: $0.00 Sit Time Hours: 27.00 Total Sit: $0.00
Overnight Rate: $0.00 Overnight Hours: 0 Total Overnight: $0.00
Total Time: $0.00
Total Estimated Expenses for Trip:
Tolls: $0.00 Parking: $0.00 Hotel: $0.00
Meals: $0.00 Misc Charges: $0.00
Estimate Total: $0.00
Calculate
Trip Total: $0.00
Save Estimate

3. Complete the fields on the Trip Estimates tab. If you need assistance completing these fields, please review the field descriptions below.

Departure Date
The date the trip departed from the origin.

Destination Calculations

Distance Rate
The charge rate per mile/kilometer. This field is populated from the Charge Basis, "Default Distance Rate" field if the account has a charge basis linked to it. *Adding a Charge Basis* on page 45.

Distance Rate is only taken from the charge basis if the account has a charge basis linked to it.

Distance
The estimated distance from the origin to the destination and back including any other mileage that might occur during the course of the trip. This could be compared later to the completion stage where a beginning and ending odometer reading is entered.

Open Trip Directions/Mapping Tool

This link provides access to a mapping tool that allows you to display point-to-point directions and a map for a trip. The generated data can be used to get a distance estimate for the trip and to generate directions for the driver. For more information, see

Time Calculations

Start Date
The date the trip/vehicle leaves the origin.

Return Date
The date the trip/vehicle returns to the origin.

Start Time
The time the trip/vehicle leaves the origin.

Return Time
The time the trip/vehicle returns to the origin.

Total Trip Hours
The total number of hours the trip is estimated to take based on the dates along with the start and return times.

Driving Rate
The dollar amount per hour that will be used in the calculation of the driver cost for the trip.

Driving Hours
The driving hours equal the total trip hours - sit time hours.

Total
The total equals the driving rate x driving hours.

Sit Rate
The dollar amount per hour that will be used in the calculation of the driver sit time cost for the trip.

Sit Time Hours
The sit time hours equal the total trip hours - regular driving hours.

Total Sit
The total sit equals the sit rate x sit time hours.

Overnight Rate
The dollar amount per hour that will be used in the calculation of the driver overnight cost for the trip.

Overnight Hours
Enter the dollar amount for eight hours of sleep time.

Total Overnight
Total overnight equals the overnight rate x overnight hours.

Total Time
Total time equals the driving total + sit time total + overnight total.

Estimated Expenses

Tolls/Parking/Hotel/Meals/Misc Charges
Enter the dollar amount for all toll charges etc.

4. Click

and the system displays the estimated total cost of the trip.
5. Click

to save the estimate.

Using the Trip Directions/Mapping Tool

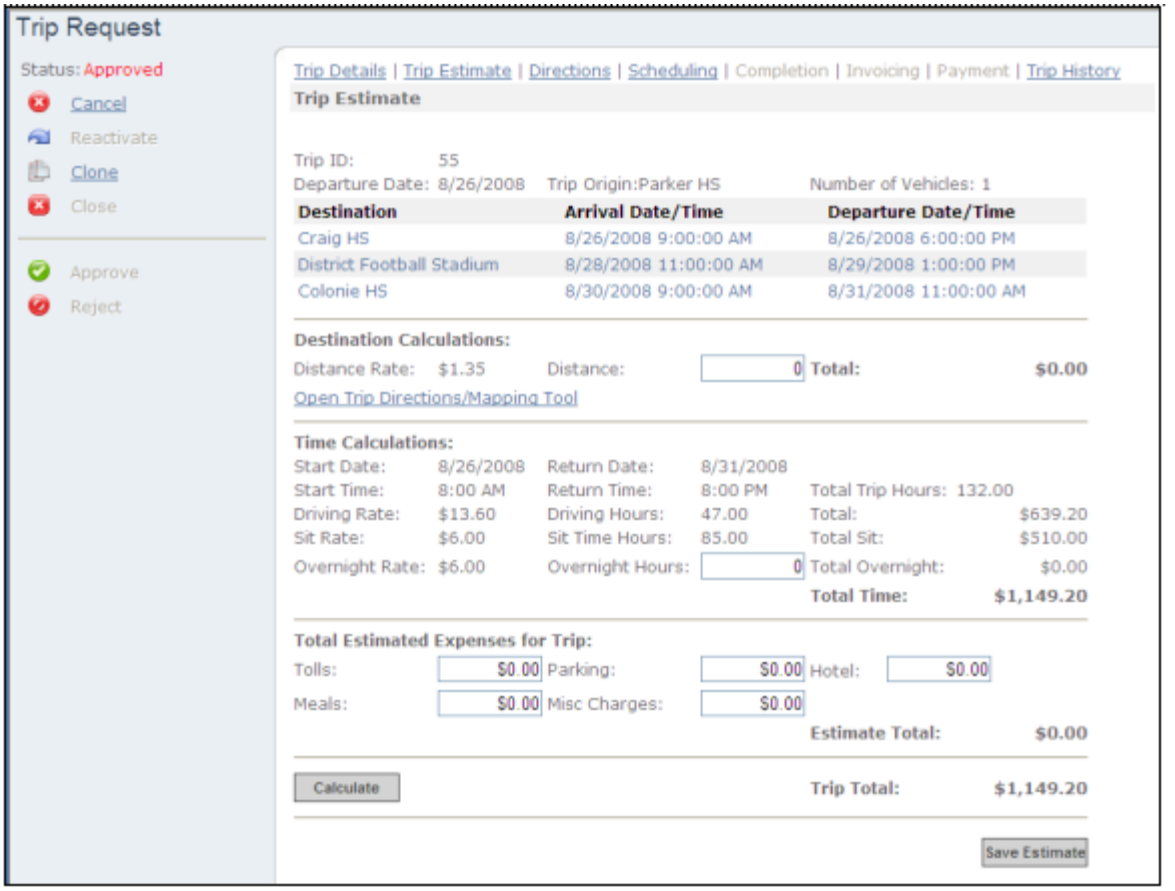
The trip directions/mapping tool allows you to generate point-to-point directions and a map for a trip. The mapping tool takes any valid origin and destination information already entered for a trip (see, *Adding a Trip Location* on page 79) and uses that information to generate point-to-point text directions along with a map that can be manipulated using standard navigation controls. If necessary, the origin and destination information can also be edited within the trip directions/mapping tool screen. Once the trip directions have been generated, you can click a button to have the estimated distance pulled into the Distance field of the Trip Estimate screen and used for distance calculations (see *Using the Estimated Distance for the Trip* on page 185). You can also click a button and have the trip directions attached to the trip request and used for driver direction (see *Attaching Trip Directions to the Trip Request* on page 186).

To use the trip directions/mapping tool:

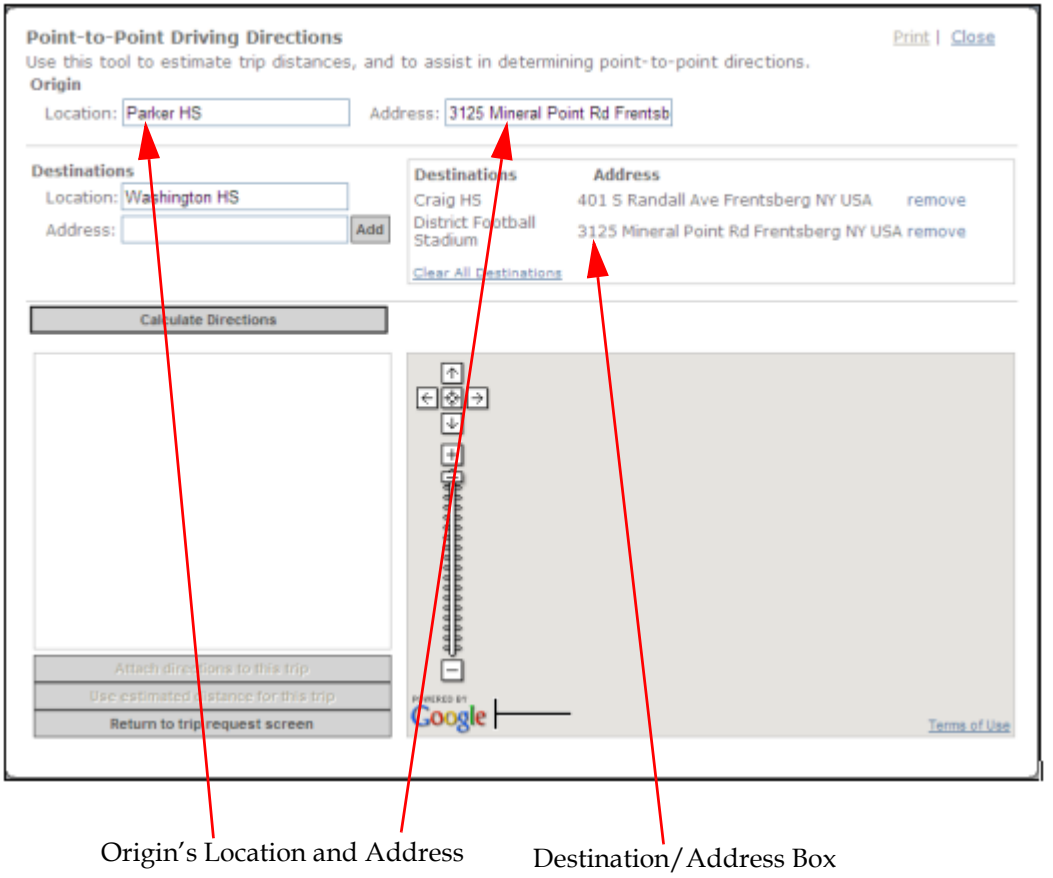
Path:) Trips > Search Trips

1. Locate a trip request (see, *Finding a Trip Request* on page 221) to display the Trip Request - Trip Details screen.

2. Select Trip Estimate to display the Trip Request - Trip Estimate screen.



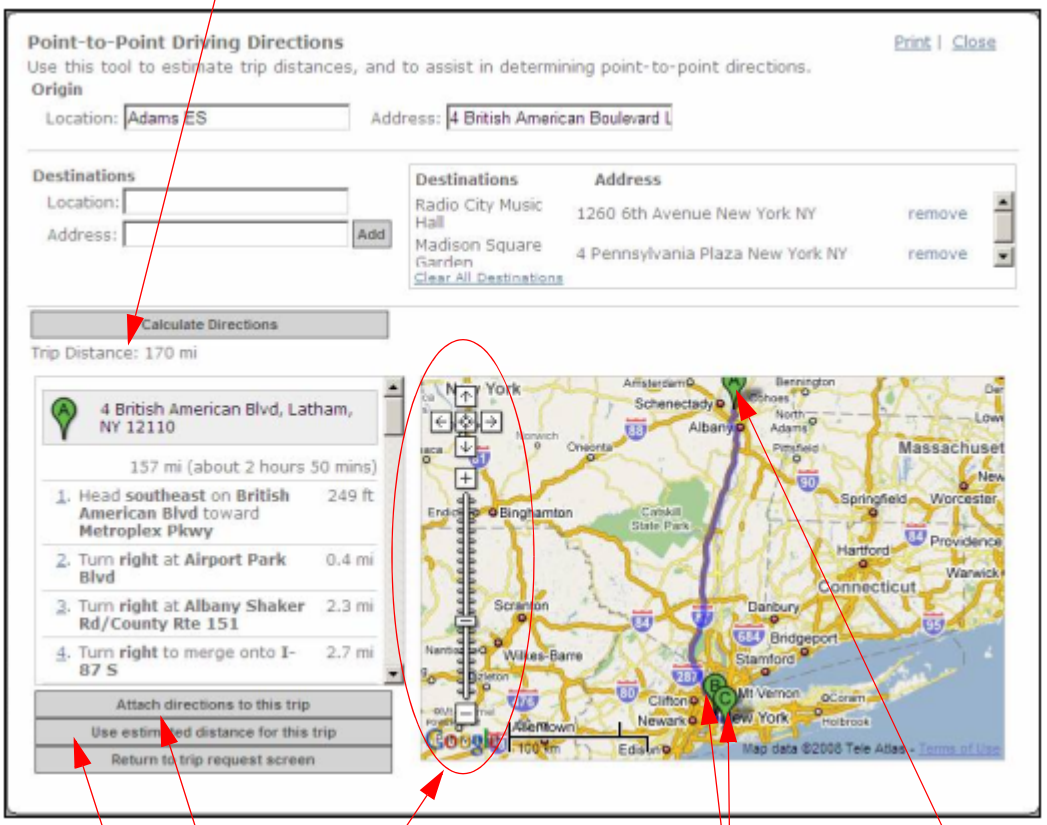
3. Click Open Trip Directions/Mapping Tool to display the Mapping Tool screen.



The mapping tool populates the Origin's Location and Address fields and the Destination/Address box with the origin and destination information entered in the Trip Details screen.

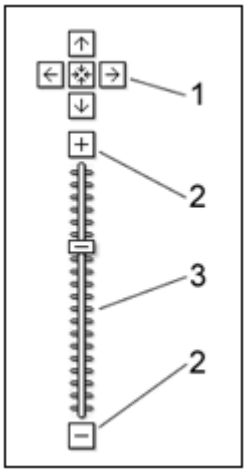
4. To add a destination, enter the location and address. Click Add to add the destination information to the Destination/Address box.

5. To remove a Destination/Address, click remove next to the corresponding information that you want to remove.
6. Click Calculate Directions to display point-to-point trip directions and a map.


Estimated Trip Distance
Point-to-Point Driving Directions
Print | Close
Use this tool to estimate trip distances, and to assist in determining point-to-point directions.
Origin
Location: Adams ES
Address: 4 British American Boulevard L
Destinations
Location:
Address:
Add
Destinations
Address
Radio City Music Hall
1260 6th Avenue New York NY
remove
Madison Square Garden
4 Pennsylvania Plaza New York NY
remove
Clear All Destinations
Calculate Directions
Trip Distance: 170 mi
4 British American Blvd, Latham, NY 12110
157 mi (about 2 hours 50 mins)
1. Head southeast on British American Blvd toward Metroplex Pkwy 249 ft
2. Turn right at Airport Park Blvd 0.4 mi
3. Turn right at Albany Shaker Rd/County Rte 151 2.3 mi
4. Turn right to merge onto I-87 S 2.7 mi
Attach directions to this trip
Use estimated distance for this trip
Return to trip request screen
Navigation Controls
Destinations
Origin
See, Attaching Trip Directions to the Trip Request
See, Using the Estimated Distance for the Trip

You can continue to enter destinations and they will be appended to the text directions and map. The estimated trip distance will also be updated.

Navigation Controls



1. **Arrows** - Click the appropriate arrow buttons to move the view north, south, east or west. Click to return to your original view.
2. **Zoom** - Click + to zoom in on the center of the map. Click - to zoom out.
3. **Zoom slider** - Drag the zoom slider up or down to zoom in or out incrementally.

7. To print the trip directions and map, click Print to display the Print dialog.
8. Choose a printer and click Print.

Using the Estimated Distance for the Trip

1. To have the estimated trip distance pulled into the Distance field of the Trip Estimate screen and used to estimate the distance for the trip. Click Use estimated distance for this trip.
2. A confirmation message displays. click **OK**.
3. Click Return to trip request screen. You will see that the Distance field has been updated.

4. Click Save Estimate . The destination calculations are updated using the estimated distance generated from the trip directions/mapping tool. See the example below.

Attaching Trip Directions to the Trip Request

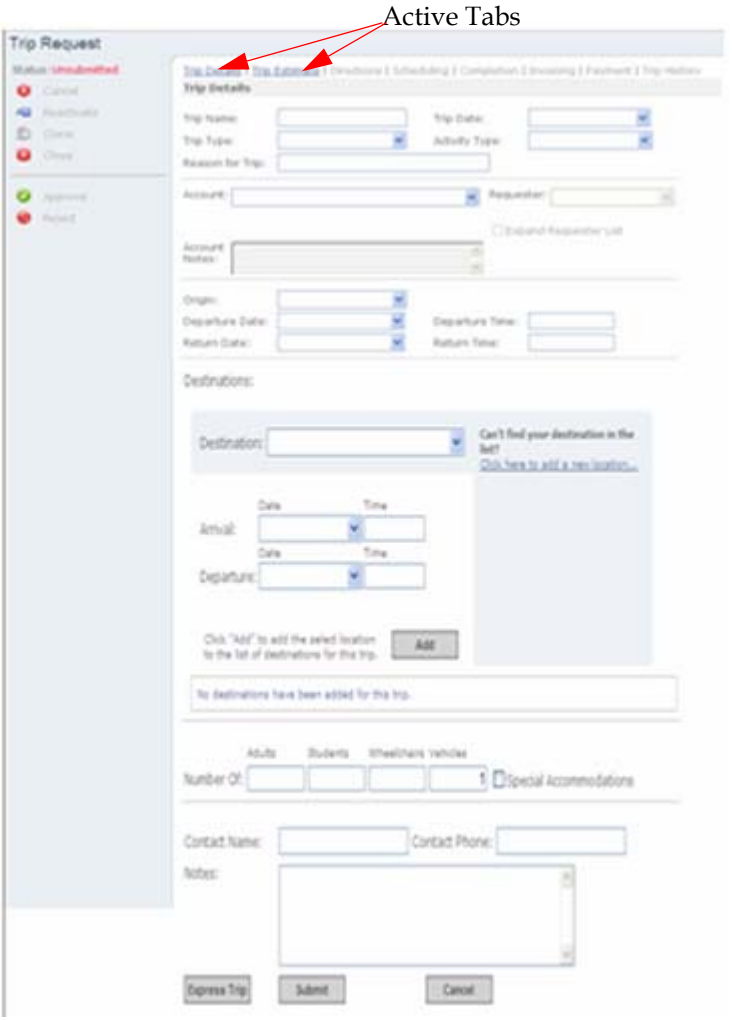
1. To have the trip directions attached to the trip request and used for driver directions, click Attach directions to this trip .
2. A confirmation message displays. click **OK**.
3. Click Return to trip request screen .
4. Click the Directions tab. The Directions screen will indicate that there are point-to-point directions attached.
5. To view the directions, click View these directions and the Trip Directions/Mapping Tool screen is displayed.
6. Click Calculate Directions and the text directions and map are displayed.
7. To print the trip directions and map, click Print to display the Print dialog.
8. Choose a printer and click Print .

Submitting a Trip Request

To submit a trip request:

Path:) **Trips > Request Trip**

1. Follow the above path to display the Trip Request - Trip Details screen.



Notice that there are only 2 tabs active, Trip Details and Trip Estimate. The other links (i.e. Directions, Scheduling etc.) will become active as you progress through the trip request process.

The first stage of the trip request process involves entering trip details and submitting the trip details/trip request.

2. Complete the fields on the Trip Details tab. If you need assistance completing these fields, please review the field descriptions below.

Trip Name
Enter a unique name for this trip in this field. This is the name that will display on the Calendar when you complete the trip request.

Trip Date
Enter or select from the calendar the date that the trip is going to take place. All the date fields will auto populate with this date.

Trip Type
Select the type of trip from the Trip Type drop-down list. See, *Setting Up Trip Types* on page 86 to learn how trip types are set up.

Activity Type
Select the type of activity from the Activity Type drop-down list. This field describes the purpose of the trip. These entries display based on the trip activities you entered. See, *Setting Up Trip Activity Types* on page 91 to learn how activity types are set up.

Reason for Trip
Enter the reason that the trip is being taken.

Account
You select the account that will be used for this trip from the Account drop-down list. The balance remaining in the account will be displayed. See, *Setting Up Accounts* on page 64 and *Working with Employee Records* on page 139.

Requester

Note: *The Requester field will be grayed out until there is an account determined.*

Once an account has been determined, select the name of the person requesting the trip from the Requester drop-down list. Names that appear in the Requester drop-down list are from the employee records. See, *Working with Employee Records* on page 139.

Users who are Super-Users have the ability to override the requester name that displays in the Requester field. When the "Expand Requester List" option is left unchecked, the names of the requesters associated with the account will display. When this option is checked, the list of names displayed in the Requester list will be governed by the status of the System Option, "Show all Employees Requester field" as follows:

Note: *Fror more information on "Show all Employees in Requester field", see "Setting the System Options" in the VersaTrans TripTracker User's & Administrator's Guide or consult the Online Help.*

- When "Show all Employees in Requester field" is **unchecked**, the expanded list of names will contain only active non-transportation employees.
- When "Show all Employees Requester field" is **checked**, the expanded list of names will contain all active transportation and non-transportation employees.

Account Notes
Displays any notes entered on the account. This field is read only.

Origin
Select the origin of the trip from the Origin drop-down list. This is the place the trip starts. These entries display based on the trip origin locations you entered. See, *Setting Up Trip Locations* on page 79.

Departure Date
Enter or select from the calendar the date of the trip's departure from the origin.

Departure Time
Enter the time of departure from the trip origin.

Return Date
Enter or select from the calendar the date of the trip's return to the origin.

Return Time
Enter the time the trip returns to the origin of the trip.

Destinations
You have the option of requesting a trip with one destination or a trip with multiple destinations.

Select a trip destination from the Destination drop-down list. This is the place the trip is going to. These entries display based on the trip destination/locations you entered. See, *Setting Up Trip Locations* on page 79.

Allows you to add a location to the actual Trip Location file when you cannot find the destination you want in the Destination drop-down list. Click the "Click here to add a new location" link to display a panel that allows you add a new location.

Enter the new location and click

and the new location is displayed in the panel and added to the list.

Note: *The new destination becomes an "Active" trip location.*

Enter the date/time the vehicle should arrive at the destination in these fields.

Enter the date/ time the vehicle should depart from the destination for another destination or the origin.

3. Clicking Add will add the new destination to the list of destinations and designate locations on the list as your trip destination.

Destination	Arrival Date/Time	Departure Date/Time	
Art Museum	10/12/2007 10:00:00 AM	10/12/2007 10:00:00 PM	Remove
Fenway Park	10/13/2007 10:00:00 AM	10/13/2007 2:00:00 PM	Remove

You can select a new destination, dates, and times and repeat as needed for each additional destination of the trip.

Number Of - Adults/Students/Wheelchairs/Vehicles
Enter the number of adults, students, wheelchairs, and vehicles associated with this trip. Trip estimates will be calculated according to the number of vehicles which gives the approver a better idea of what the costs might be for the trip requested.

Note: *The actual number of vehicles will still be determined at the scheduling stage where the initial number from the Trip Request may increase or decrease changing the final cost of the trip.*

Special Accommodations
Check this box if special accommodations will be needed for this trip, (i.e. any considerations for medical or safety needs such as wheelchair).

Contact Name/Phone
Enter the name and phone number of the contact person for the trip.

Notes
Enter any notes that might be applicable to the trip.

4. When you have finished the entries on the Detail Entries tab, click Submit to submit or Cancel to cancel the trip request.

   The system updates the trip record with the new data and displays a status of Requested. The system also sends an email confirmation message according to your message option settings.

5. During the trip request process, you can go back and edit the different stages by clicking on the appropriate tab and clicking Edit Request.
6. Click the Trip History tab if you want to view the history of the trip. See, *Viewing the History of a Trip Request* on page 213.

   Once a trip request has been submitted successfully, you can clone the trip request. You will notice that the Clone link is now active. See, *Cloning a Trip Request* on page 217.

Sending Out a Trip Request for Approval

Once a trip request has been successfully submitted, it is ready to be sent out for approval.

To send out a trip request for approval:

Path:) Trips > Search Trips

1. Locate a trip request (see, *Finding a Trip Request* on page 221) to display the Trip Request - Trip Details screen.
2. Once you have located the Trip Request Click Approve. A comments box displays.
3. Enter any comments that you may have concerning this trip in the comments box. The approver(s) will be able to view your comments.
4. Click Approve Trip to send the trip request out for approval and begin the approval process.

Once a trip request has been successfully sent out for approval, it will begin to flow through the approval process. The levels of approval that your trip

request may encounter depends on the account this trip request is using and the approval path associated with this account. See, *Setting Up Approval Paths* on page 162. The person(s) at the first level in the approval process will receive an email indicating that their approval is needed on a trip. The link trip requests pending your approval. in the email, will take the approver directly to the Trip Request - Trip Detail screen for that trip. The approver can then choose to Approve or Reject the trip (see, *Rejecting a Trip Request* on page 195). If they approve the trip, it then moves to the next approver in the approval path and the process is repeated.

Once the final Approver has approved the trip, it moves to a status of "Approved". The Trip Request screen's "Scheduling tab" becomes active and you can proceed to the scheduling stage. See, *Scheduling a Trip* on page 199.

Rejecting a Trip Request

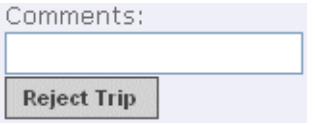
At any stage before a trip is scheduled, a Trip Request can be reviewed by an Approver and assigned a decision of "Rejected". The Trip Request is then sent back to the Requester (and the submitter if the submitter is different than the requester). The Requester can then make the necessary changes and resubmit the Trip Request. If the Requester does not resubmit the Trip Request, it will retain the status of "Rejected".

To reject a trip request:

Path:) **Trips > Request Trip**

1. Locate the trip request (see, *Finding a Trip Request* on page 221) to display the Trip Request - Trip Details screen.
2. Click

. A comment box and Reject button are displayed.



3. Enter the reason for the rejection in the comment box and then click

.

   The system sends an email confirmation message to the Requester and submitter (if submitter is different from Requester).

   Upon receiving the rejection notice, the Requester can make any necessary changes and resubmit the request. See, *Resubmitting a Rejected Trip Request* on page 218.

   Note: *The Trip Request remains in the database and is available for reporting even if it is not resubmitted.*

Adding Directions to a Trip Request (Optional)

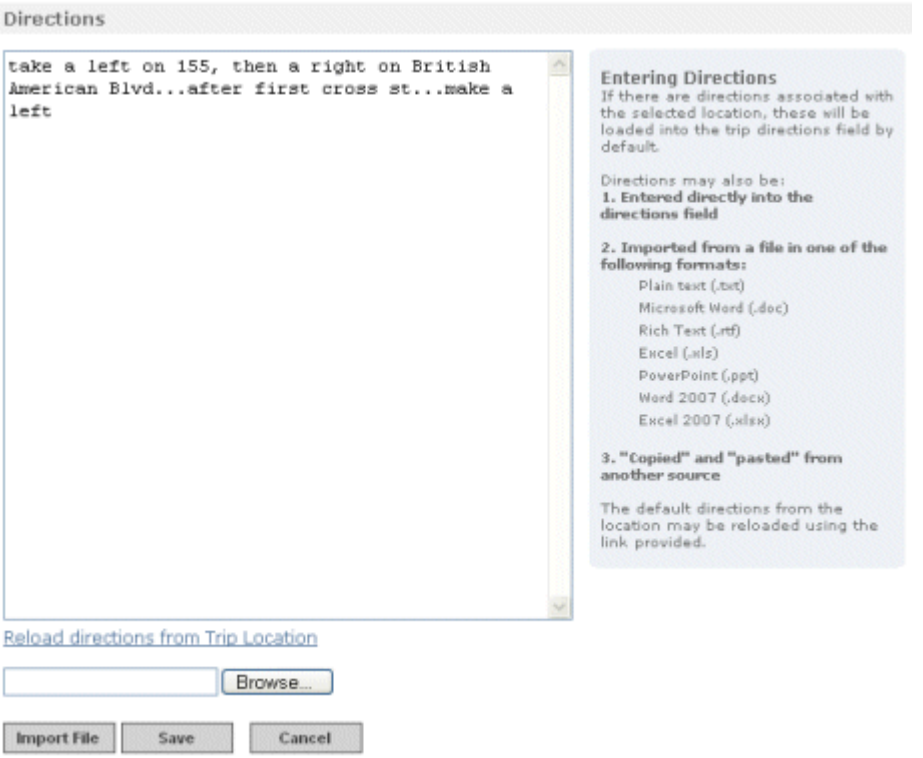
You have the option of adding directions to a trip request which can be printed at the same time as the trip sheet. The trip directions are pulled from the directions entered in Trip Locations (see, *Adding a Trip Location* on page 79). If there are multi-destinations then the directions from the trip locations are concatenated. If directions aren't entered in Trip Locations, then you will need to enter the directions in the Text box or import directions that exist in one of the file formats shown below. You also have the option of using the Trip Directions Mapping Tool

To add directions to a trip request:

Path:) Trips > Search Trips

1. Locate a trip request (see, *Finding a Trip Request* on page 221) to display the Trip Request - Trip Details screen.

2. Select the Directions tab to display the Directions screen.


Directions
take a left on 155, then a right on British American Blvd...after first cross st...make a left
Entering Directions
If there are directions associated with the selected location, these will be loaded into the trip directions field by default.
Directions may also be:
1. Entered directly into the directions field
2. Imported from a file in one of the following formats:
Plain text (.txt)
Microsoft Word (.doc)
Rich Text (.rtf)
Excel (.xls)
PowerPoint (.ppt)
Word 2007 (.docx)
Excel 2007 (.xlsx)
3. "Copied" and "pasted" from another source
The default directions from the location may be reloaded using the link provided.
Reload directions from Trip Location
Browse...
Import File
Save
Cancel

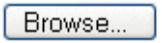
If directions were entered in the Admin > System Lists > Trip Locations for the destinations selected in Trip Details, then those directions will display in the Directions text box. You can edit the directions as necessary.

3. If directions weren't entered in Trip Locations, type the trip directions in the text box provided.

4. Click Open Trip Directions/Mapping Tool to use the Trip Directions/Mapping Tool to get a distance estimate for the trip and to generate directions for the driver. This information can then be attached to the Directions. See, *Using the Trip Directions/Mapping Tool* on page 181.

You can also copy and paste directions from another source or import the directions from a file in the following formats:

- Plain Text (.txt)
- Microsoft Word (.doc)
- Rich Text (.rtf)
- Excel (.xls)
- PowerPoint (.ppt)
- Word 2007 (.docx)
- Excel 2007 (.xlsx)

5. Click 

and navigate to the txt file.
6. Click

and the directions in the txt file are imported into the Directions text box.
7. If you make a mistake, and want the original directions from Trip Locations, click Reload directions from Trip Location .

Scheduling a Trip

Once the Trip Request is approved by the final approver in the approval path, the Scheduling tab becomes active and you can schedule a trip. You can schedule as many vehicles, drivers, monitors, and aides as necessary. If a driver turns down a trip, you can record a trip refusal for that driver. If a destination is drop and return, you can have the driver return to the origin after dropping students off at the destination, as well as having the option of assigning different drivers for each 'leg' of the trip.

Path:) **Trips > Search Trips**

1. Locate a trip request (see, *Finding a Trip Request* on page 221) to display the Trip Request - Trip Details screen.
2. Select the Scheduling tab to display the Trip Request - Scheduling screen.

Filter Drivers by Account
If there are drivers associated with the account the filter will be on by default. If there are no drivers associated with the account the filter will be off by default.

3. To add a vehicle and driver to the trip, click the # 1 tab.

4. Click the **Driver** drop-down button and click on a drives's name to select it.

   In order for a name to appear on the driver's list, the employee's record must indicate that they are a "driver", "active", "qualified for activity vehicles", and "Appear in driver queue". Finally, the driver must qualify according to the driver assignment rules. The driver assignment rules will determine the order in which the drivers appear in the list.

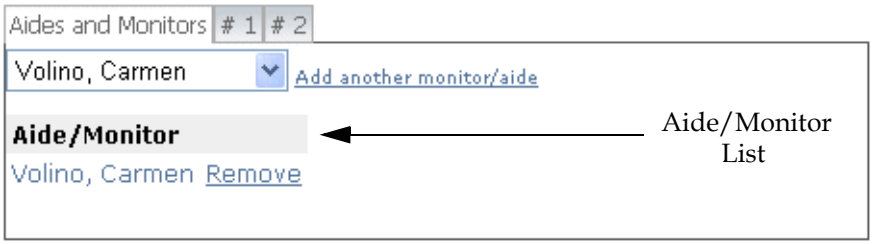
5. Click the **Vehicles** drop-down button and click on a vehicle's ID to select it.

6. To add another vehicle or driver, click add another vehicle/driver.. A # 2 tab displays where you can enter another vehicle or driver

7. To add an aide and/or monitor to the trip, click the Aides and Monitors tab.

8. Click the drop-down button and click on an aide/monitor's name to select it.

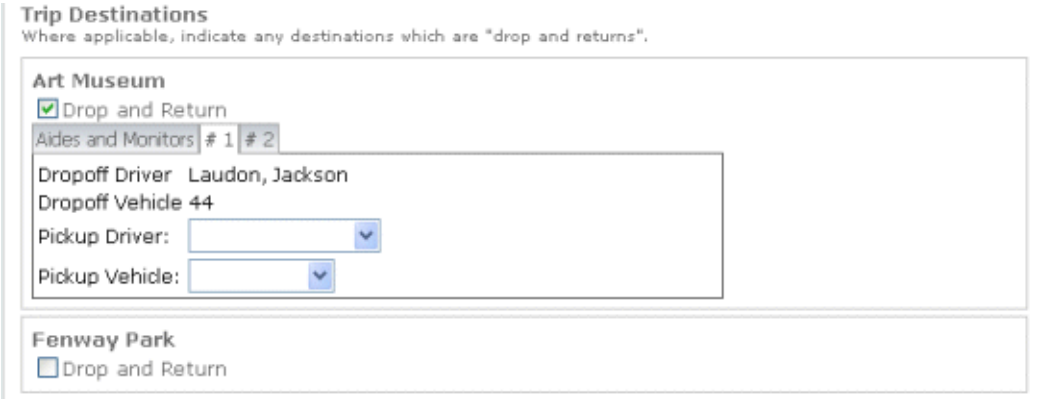
9. To add another aide/monitor, click Add another monitor/aide . The name you selected is added to the Aide/Monitor list.



10. You can continue to add as many aides/monitors as necessary.
11. To add a driver refusal, click add a driver refusal..

12. Click the Driver drop-down button and click on a driver's name to select it.
13. Enter the reason for the refusal in the Reason field.
14. Click the Replacement Driver drop-down button and click on a driver's name to select it.
15. Click Ok to save the refusal.

16. If a destination is a "Drop and Return" (trip where the driver drops students at the destination and returns to the origin), check the box next to the destination that is drop and return.



You have the option of assigning different drivers and vehicles for each 'leg' of the trip.

17. Click the Pickup Driver drop-down button and click on a driver's name to select it.
18. Click the Pickup Vehicle drop-down button and click on a vehicle's ID to select it.
19. Click Save to save your scheduling entries. If a driver or bus is unavailable or for whatever reasons you need to make a change, you can return to the applicable section, make the changes and re-save the schedule. The system sends an email confirmation message according to your message option settings.

Completing a Trip

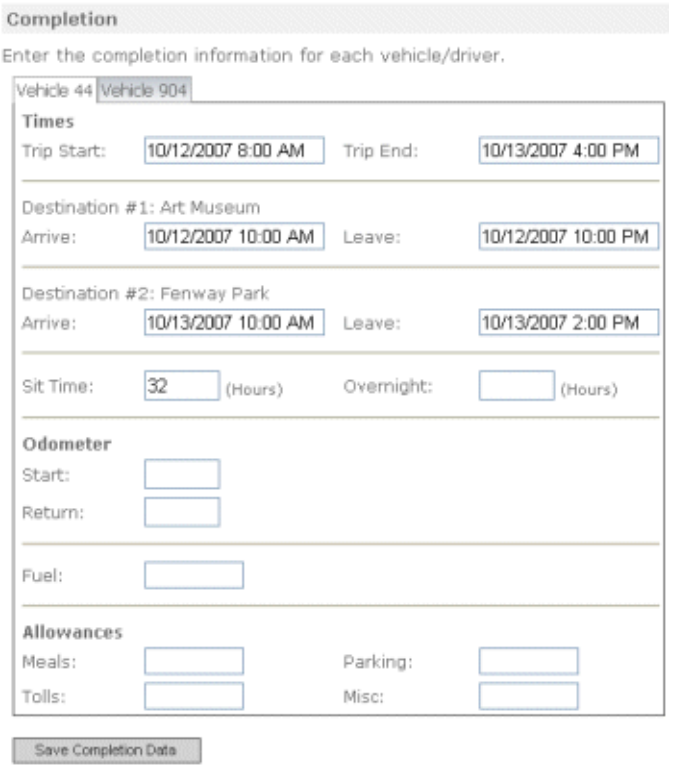
Once a trip is taken, you can enter the actual times, odometer readings, and allowances for each vehicle and driver.

To complete a trip:

Path:) Trips > Search Trips

1. Locate a trip request (see, *Finding a Trip Request* on page 221) to display the Trip Request - Trip Details screen.

2. Select the Completion tab to display the Trip Request - Completion screen.



There will be tabs (i.e. Vehicle 44 Vehicle 904) for each vehicle and associated driver used for the trip. You must enter completion information for all vehicles and associated drivers.

Times

Times are displayed in the applicable fields from the Trip Details and Trip Estimation information entered. You can enter missing information and make adjustments to reflect the actual times of the trip.

Odometer
Enter the actual odometer mileage and fuel used.

Allowances
Enter the actual allowances for meals, etc.

3. Click Save Completion Data when you have finished making the final trip entries.

Invoicing a Trip and Printing/Saving the Invoice

Once the trip is completed and the actual times, odometer readings, and allowances for each vehicle and driver are entered, you can create the invoice.

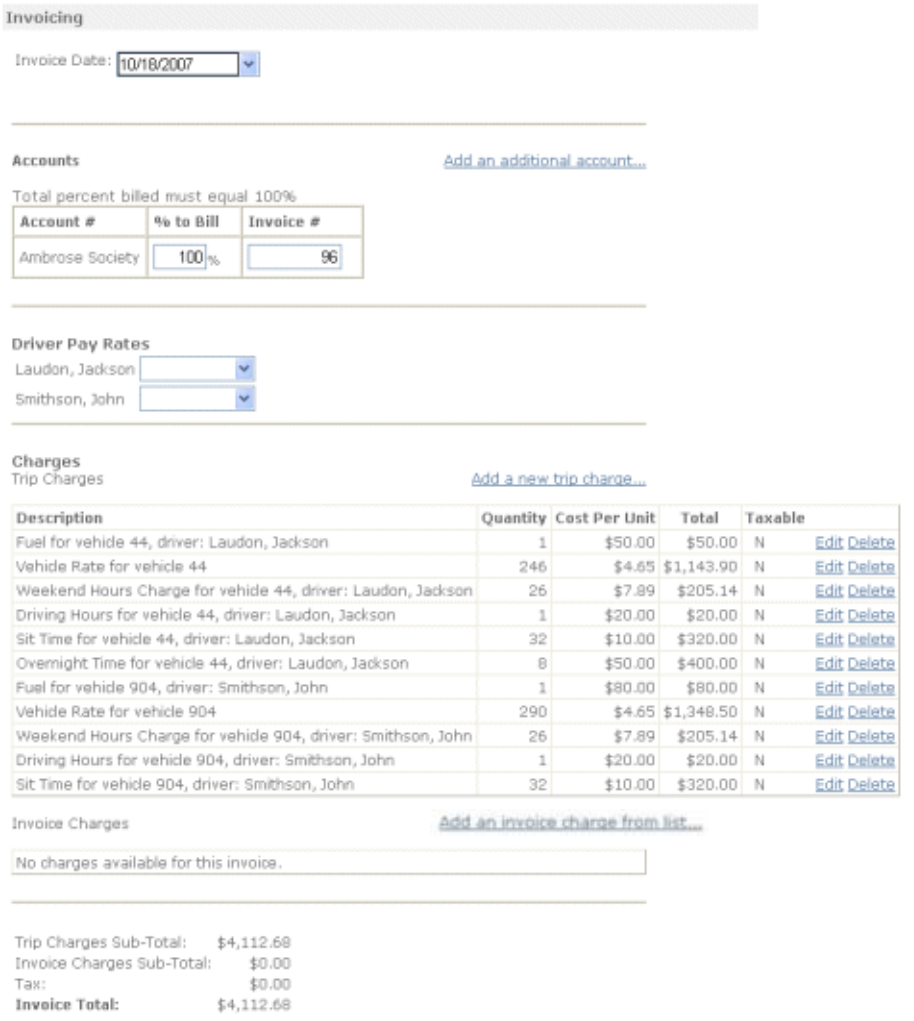
If a Job Category is selected for an employee, the associated rates are used. Otherwise, the Charge Basis associated with the Account that was defined on the Trip Request is used. If this is not the case, the rates from the System Options page are used.

To invoice a trip and print/save the invoice:

Path:) Trips > Search Trips

1. Locate a trip request (see, *Finding a Trip Request* on page 221) to display the Trip Request - Trip Details screen.

2. Select the Invoicing tab to display the Trip Request - Invoicing screen.



Invoicing

Invoice Date: 10/18/2007

Accounts Add an additional account...

Total percent billed must equal 100%

Account #	% to Bill	Invoice #
Ambrose Society	100 %	96

Driver Pay Rates

Laudon, Jackson

Smithson, John

Charges

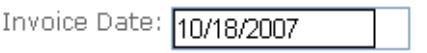
Trip Charges Add a new trip charge...

Description	Quantity	Cost Per Unit	Total	Taxable	
Fuel for vehicle 44, driver: Laudon, Jackson	1	$50.00	$50.00	N	Edit Delete
Vehicle Rate for vehicle 44	246	$4.65	$1,143.90	N	Edit Delete
Weekend Hours Charge for vehicle 44, driver: Laudon, Jackson	26	$7.89	$205.14	N	Edit Delete
Driving Hours for vehicle 44, driver: Laudon, Jackson	1	$20.00	$20.00	N	Edit Delete
Sit Time for vehicle 44, driver: Laudon, Jackson	32	$10.00	$320.00	N	Edit Delete
Overnight Time for vehicle 44, driver: Laudon, Jackson	8	$50.00	$400.00	N	Edit Delete
Fuel for vehicle 904, driver: Smithson, John	1	$80.00	$80.00	N	Edit Delete
Vehicle Rate for vehicle 904	290	$4.65	$1,348.50	N	Edit Delete
Weekend Hours Charge for vehicle 904, driver: Smithson, John	26	$7.89	$205.14	N	Edit Delete
Driving Hours for vehicle 904, driver: Smithson, John	1	$20.00	$20.00	N	Edit Delete
Sit Time for vehicle 904, driver: Smithson, John	32	$10.00	$320.00	N	Edit Delete

Invoice Charges Add an invoice charge from list...

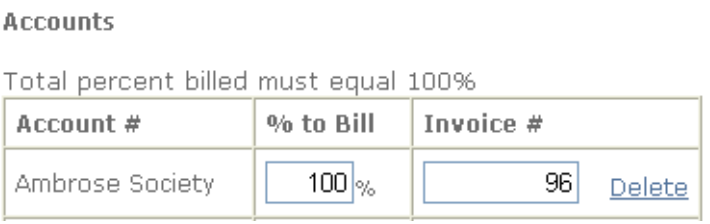
No charges available for this invoice.

Trip Charges Sub-Total:	$4,112.68
Invoice Charges Sub-Total:	$0.00
Tax:	$0.00
Invoice Total:	$4,112.68

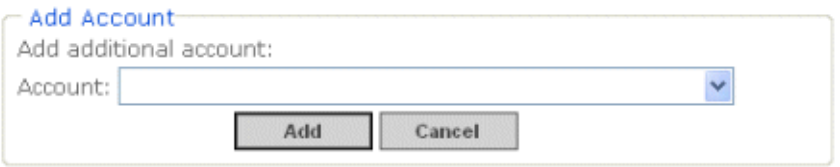
Invoice Date 

3. Enter an invoice date or select a date from the calendar.

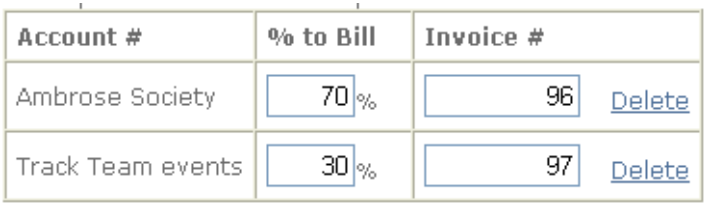
Accounts
The account specified in Trip Details is displayed along with a unique invoice #. The total percent billed must equal 100%.



4. If you want to add an additional account, click Add an additional account... .



5. Click in the Account field, select an account and click Add .



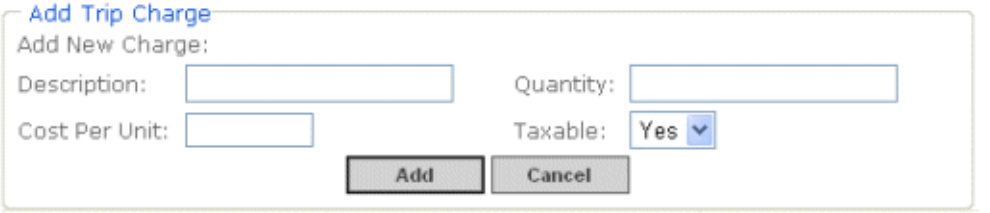
In the case of multiple accounts, the total charge must be divided among the accounts by percentage and equal 100%.

Driver Pay Rates
The drivers associated with the trip request are displayed in the Driver Pay Rates panel. Pay rates are only used if the Charge Basis has "use driver's rates" selected.

6. Click in the Drivers Pay Rate Panel and select a pay rate for each driver.

Charges
Displays a description of the trip charges, the quantity, the cost per unit, the total and whether or not the trip is taxable. These items can be edited or deleted. Also, new trip and invoice charges can be added.

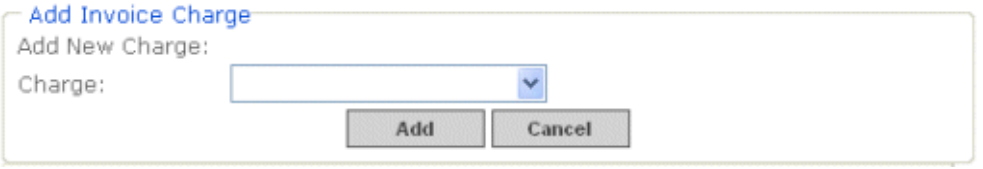
7. To add a new trip charge, click Add a new trip charge... .



8. Enter/select the description, quantity, cost per unit, and whether or not the trip is taxable and click

. The new trip charges are added.

9. To add a new invoice charge, click Add an invoice charge from list... .



10. Enter/select the new invoice charge and click Add . The new invoice charge is added.

Editing Trip Charges
The description of the trip charges, the quantity, the cost per unit, the total and whether or not the trip is taxable can be edited.

11. Click Edit for the trip charge that you want to work with.

12. Type over the description and/or charges that you want to change. In the Taxable drop-down list, select Yes or No and click Save . The trip charge total will be automatically updated.
13. At any point, you can click Regenerate Invoice and the invoice will be recreated from the completion data.
14. When you are finished working with the invoice, click Save Invoice . The system sends an email confirmation message according to your message option settings.

Printing and the Invoice
The invoice can be previewed and then printed on your printer.

15. Click Printable Copy to display the print preview screen.

VersaTrans TripTracker Invoice

Invoice Date	Invoice Number
10/10/2007	02

Trip ID: 107
Trip Name: Aquarium
Trip Date: 9/29/2007
Bill To: Ambrose Society
100 Clinton Rd
Latham NY 12110

DESCRIPTION	TAXABLE	PRICE	QUANTITY	TOTAL
Vehicle 1: Distance Charge	No	$4.65	35	$162.75
Vehicle 1: Driving Hours	No	$0.00	10	$0.00
Vehicle 1: Weekend Hours Charge	No	$7.89	10	$78.90

Trip Total	$241.65
Tax	$0.00
Total	$241.65

Please Note – you are responsible for 65.00% of this invoice: $157.07

Printed On 10/18/2007 1:21:03 PM Page 1 of 2

16. Click to send the invoice to your printer.
17. Click and save the invoice in PDF fromat..

Entering Payments for a Trip

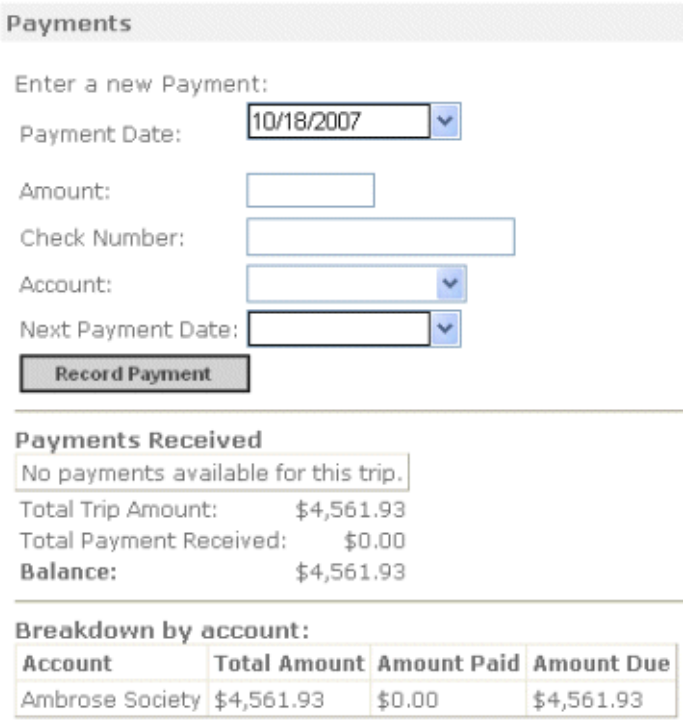
After a trip is invoiced, you can enter the payments in VersaTrans TripTracker. We use a simple payment recording system that is not meant to take the place of your organization's accounting process but to track payments for reporting. VersaTrans TripTracker can handle full and partial payments.

To invoice a trip and print/export the invoice:

Path:) Trips > Search Trips

1. Locate a trip request (see, *Finding a Trip Request* on page 221) to display the Trip Request - Trip Details screen.

2. Select the Payment tab to display the Trip Request - Payments screen.



3. Complete the fields with the appropriate information.

4. Click Record Payment when you are finished entering payment information. The system displays the payment received and sends an email confirmation message according to your message option settings.

Payments Received

Date	Amount	Check Number	
10/18/2007	$2,736.17	334	Edit

Total Trip Amount: $4,561.93
Total Payment Received: $2,736.17
Balance: $1,825.76

Breakdown by account:

Account	Total Amount	Amount Paid	Amount Due
Ambrose Society	$4,561.93	$2,736.17	$1,825.76

The Amount Due field indicates the balance owed on this account. If there is no amount due, $0.00 displays in this field.

Viewing the History of a Trip Request

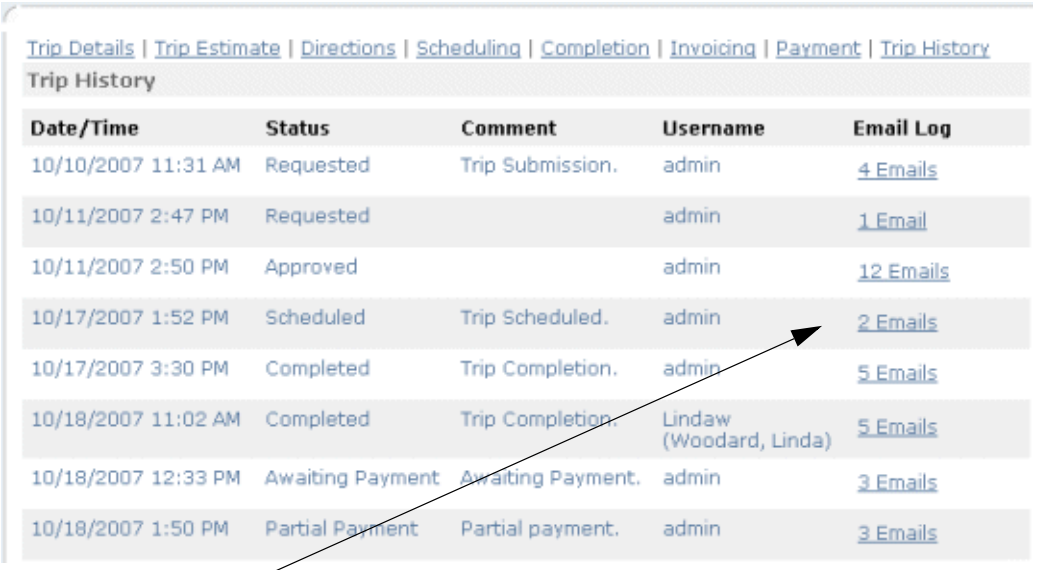
The Trip History screen allows you to view the Date/Time, Status, Comment, User Name and Email information relating to a trip as it progressed through the different stages of the trip request process.

To view a history of the Trip Request:

Path: Trips > Search Trips

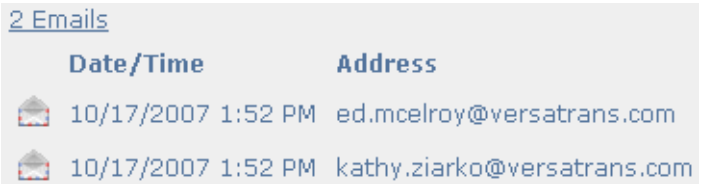
1. Locate a trip request (see, *Finding a Trip Request* on page 221) to display the Trip Request - Trip Details screen.

2. Select the Trip History tab to display the Trip Request - Trip History screen.


Trip Details | Trip Estimate | Directions | Scheduling | Completion | Invoicing | Payment | Trip History
Trip History
Date/Time Status Comment Username Email Log
10/10/2007 11:31 AM Requested Trip Submission. admin 4 Emails
10/11/2007 2:47 PM Requested admin 1 Email
10/11/2007 2:50 PM Approved admin 12 Emails
10/17/2007 1:52 PM Scheduled Trip Scheduled. admin 2 Emails
10/17/2007 3:30 PM Completed Trip Completion. admin 5 Emails
10/18/2007 11:02 AM Completed Trip Completion. Lindaw (Woodard, Linda) 5 Emails
10/18/2007 12:33 PM Awaiting Payment Awaiting Payment. admin 3 Emails
10/18/2007 1:50 PM Partial Payment Partial payment. admin 3 Emails

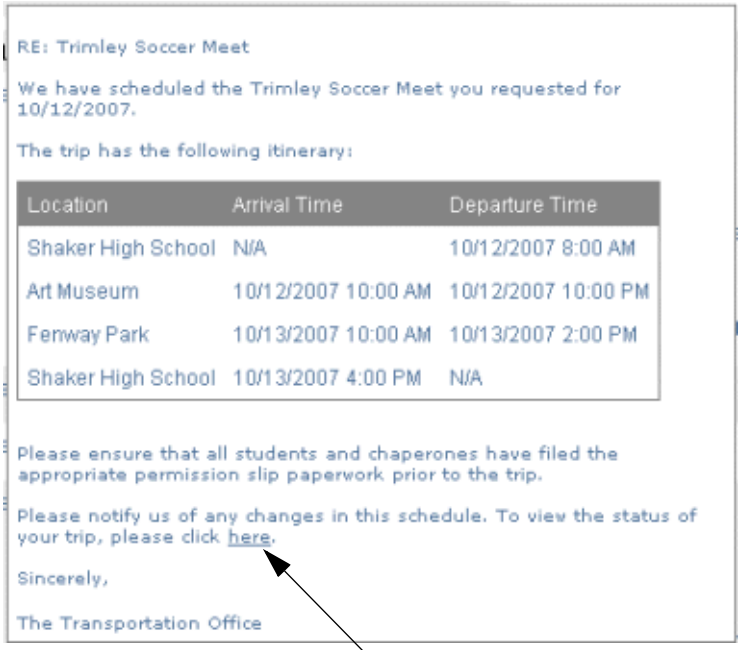
The Email log lists the number of emails sent for each stage of the Trip Request.

3. To view email information for a specific stage, click the email link in that row. For example, click 2 Emails .



A panel displays containing the Date/Time the email was sent and the address that the email was sent to.

4. To view the contents of the email, move the cursor over the envelope icon .


RE: Trimley Soccer Meet
We have scheduled the Trimley Soccer Meet you requested for 10/12/2007.
The trip has the following itinerary:
Location
Arrival Time
Departure Time
Shaker High School
N/A
10/12/2007 8:00 AM
Art Museum
10/12/2007 10:00 AM
10/12/2007 10:00 PM
Fenway Park
10/13/2007 10:00 AM
10/13/2007 2:00 PM
Shaker High School
10/13/2007 4:00 PM
N/A
Please ensure that all students and chaperones have filed the appropriate permission slip paperwork prior to the trip.
Please notify us of any changes in this schedule. To view the status of your trip, please click here.
Sincerely,
The Transportation Office

You can click this link to display the Trip Request - Trip Details screen.

Using Trip Express

Trips Express allows a user with Trip Express privileges to enter a Trip Request and approve it at the same time. Using Trip Express skips the "approval path process" and the trip request immediately becomes ready for scheduling. You must have Trip Request privileges to use this feature.

To use Trip Express:

Path:) Trips > Request Trip

1. Follow the above path to display the Trip Request - Trip Details screen.
2. Complete the Trip Details Screen, See *Submitting a Trip Request* on page 187.
3. When Trip Details are complete, click

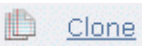
. The system sends an email confirmation message according to your message option settings.
4. You have the option of completing a trip estimate, directions or go directly to Scheduling. For information on any of these tasks, see the following:
    - *Adding a Trip Estimate to a Trip Request* on page 176.
    - *Adding Directions to a Trip Request (Optional)* on page 196.
    - *Scheduling a Trip* on page 199.

Cloning a Trip Request

Cloning allows you to select a trip in any stage of the trip request process, including closed, completed, cancelled, rejected or otherwise inactive trips, and submit a copy of the trip request through the trip request process. Any data that was entered in Trip Details, Trip Estimate or Directions will be retained and accessible for editing.

To clone a trip request:

Path:) Trips > Request Trip

1. Locate a trip request (see, *Finding a Trip Request* on page 221) to display the Trip Request - Trip Details screen.
2. Click 

and the trip request is cloned and given a status of Requested. Any data that was entered in Trip Details, Trip Estimate or Directions is retained and accessible for editing.

   Note: *VersaTrans TripTracker does not save the driver and bus assignment information from trip to trip, so you must assign the bus and driver again.*

3. You can proceed through the remaining stages of the Trip Request process. See, *Requesting a Trip* on page 175.

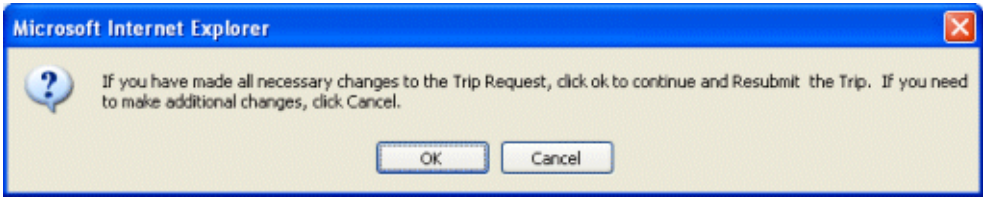
Resubmitting a Rejected Trip Request

When a Requester wants to reinstate a rejected trip, they must edit the request data and then resubmit the request.

To resubmit a rejected a trip request:

Path:) **Trips > Request Trip**

1. Locate the trip request (see, *Finding a Trip Request* on page 221) to display the Trip Request - Trip Details screen.
2. Click Resubmit. A confirmation dialog displays.


Microsoft Internet Explorer
If you have made all necessary changes to the Trip Request, click ok to continue and Resubmit the Trip. If you need to make additional changes, click Cancel.
OK
Cancel

3. Click OK if you have made all necessary changes and the trip will be reactivated and returned to "Requested" status.

   The System will generate an email notification to the Approver that the trip has been resubmitted. When you have multiple Approvers, your system options settings determine who the resubmitted request will be sent to. The resubmitted request will either be sent to the Approver who rejected the trip or to all designated Approvers.

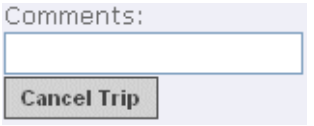
Canceling a Trip Request

A trip Requester can cancel a trip at any stage before the trip is completed.

To cancel a trip request:

Path:) Trips > Request Trip

1. Locate the trip request (see, *Finding a Trip Request* on page 221) to display the Trip Request - Trip Details screen.
2. Click Cancel. A comment box and Reject button are displayed.



3. Enter the reason for the cancellation in the comment box and then click Cancel Trip.

   The system sends an email confirmation message to Requestor. All users in the request process who have dealt with the trip in some capacity will also receive email alerts.

   Upon receiving the cancellation notice, the Requester can make any necessary changes and reactivate the request. See, *Reactivating a Cancelled Trip Request* on page 220.

   Note: *A cancelled Trip Request remains in the database and is available for reporting even if it is not reactivated.*

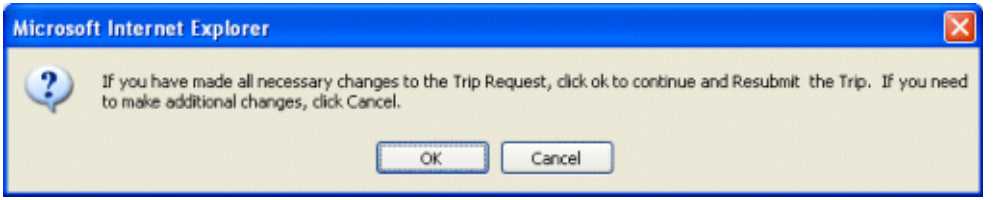
Reactivating a Cancelled Trip Request

When a Requester wants to reactivate a cancelled trip, they can make any necessary changes and then reactivate the request.

To reactivate a cancelled trip request:

Path:) **Trips > Request Trip**

1. Locate the trip request (see, *Finding a Trip Request* on page 221) to display the Trip Request - Trip Details screen.
2. Click Reactivate. A confirmation dialog displays.


Microsoft Internet Explorer
If you have made all necessary changes to the Trip Request, click ok to continue and Resubmit the Trip. If you need to make additional changes, click Cancel.
OK
Cancel

3. Click OK if you have made all necessary changes and the trip will be reactivated and returned to "Requested" status.

Finding a Trip Request

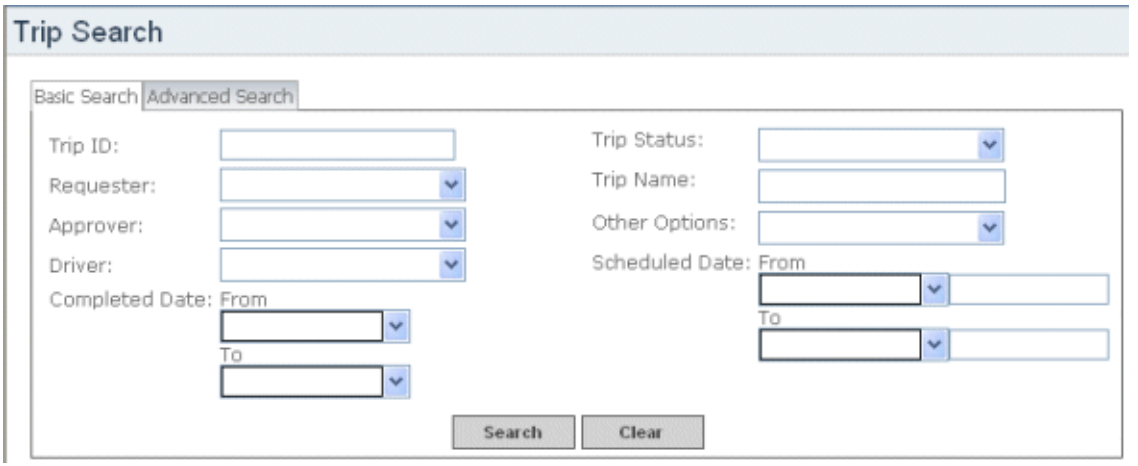
You can use the basic or advanced search methods to find a Trip Request in the VersaTrans TripTracker system. Whether you use the basic or advanced search largely depends upon what criteria you know and how you want the system to perform the search.

Finding a Trip Request Using the Basic Search

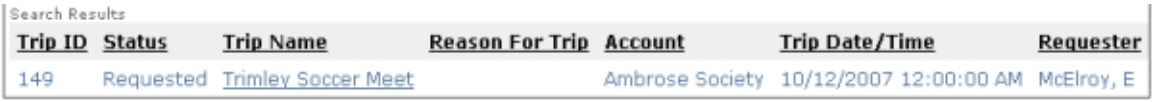
To find a Trip Request using the basic search:

Path:) **Trips > Search Trips**

1. Follow the above path to display the Trip Search screen.
2. Click the Basic Search tab.



3. Clicking the Search button without entering information will display all trip requests.
4. For a specific trip request, enter the information or select the trip request information from drop-down lists. You can perform a search on a single criteria, such as requester, etc.
5. Click Search to display the trip request search results.


Search Results

Trip ID	Status	Trip Name	Reason For Trip	Account	Trip Date/Time	Requester
149	Requested	Trimley Soccer Meet		Ambrose Society	10/12/2007 12:00:00 AM	McElroy, E

You can click on the heading of any column in the search results to sort by that column.

6. Click on the Trip Name to display the Trip Request screen.

Finding a Trip Request Using the Advanced Search

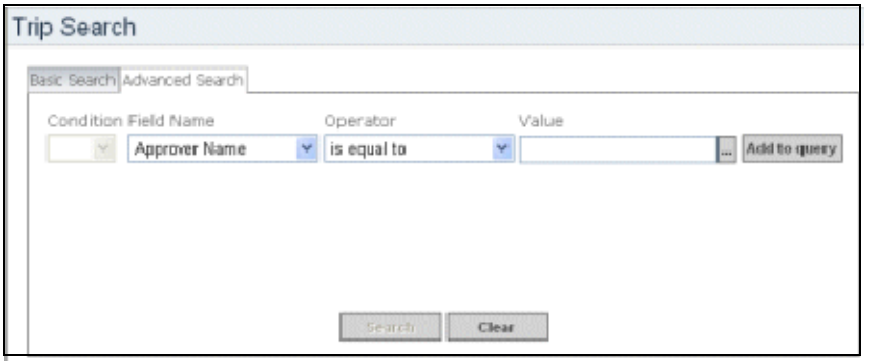
If you want to enter more specific criteria, use the advanced search. The advanced search gives you more options in choosing criteria by introducing an operator, such as is equal, not equal, less than, and is between.

To find a trip request using the advanced search:

Path:) **Trips > Search Trips**

1. Follow the above path to display the Trip Search screen.

2. Click the **ADVANCED** search tab.

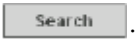


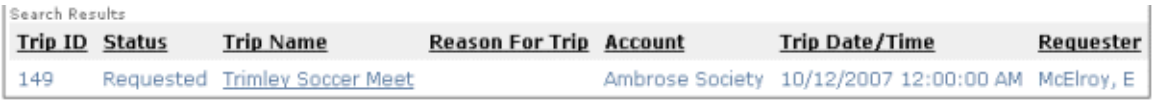
3. Select the field you want to search on from the **FIELD NAME** drop-down list. Field names include: **APPROVER NAME**, **DRIVER NAME**, **REQUESTER NAME**, **SCHEDULED DATE**, **TRIP NAME**, **TRIP STATUS**, and **TRIP ID**.

4. Select an operator for this criterion from the Operator drop-down list. Operators include: **IS EQUAL**, **IS NOT EQUAL**, **IS LESS THAN**, **IS LESS THAN OR EQUALTO**, **IS GREATER THAN**, **IS GREATER THAN OR EQUAL TO**, **IS BETWEEN**, **IS IN**, **IS NOT IN**, **DOES NOT CONTAIN DATA**, and **CONTAINS DATA**.

5. Depending on the Field Name selected, click or to display a list of values or enter a value in the Value field. If you select a value, click **OK**.

6. Click . The Condition field becomes active allowing you to select a condition (AND or OR) and if desired, continue entering criteria to the query.

7. When you are finished entering criteria, click  . The Search Results panel displays the trip requests that match the query.



Chapter 4

Generating Trip Reports

Topics In This Chapter:

VersaTrans TripTracker Reports Overview, 226

VersaTrans TripTracker Reports Overview

The VersaTrans TripTracker Reports provide a way of managing the most important information in the system. Using the report tools, you can preview, print, or export a report as an Excel or Acrobat (PDF) file.

Types of Reports

There are four types of reports in the VersaTrans TripTracker system.

1. The Listing Reports provide simple listings of accounts, trip locations, and vehicles in the VersaTrans TripTracker system.
2. The Accounting Reports provide financial information regarding trips that have been billed. They assist in the monitoring of trips charges and payment.
3. The Trip Reports give you several ways to keep track of the trip activity and trip details.
4. The Employee Reports give you information about employees, employee certifications, driver refusals, employee lists, and driver time.

Listing Reports

The Listing Reports give you simple lists of basic information you have entered into VersaTrans TripTracker:

- *Accounts*: This report shows the details of each account you have entered into the system including contact information and budget information.
- *Buildings*: This report provides details on all Buildings defined in the VersaTrans TripTracker system.

- *Trip Locations*: This report details the trip locations (origins and destinations) defined in the VersaTrans TripTracker system.
- *Vehicles*: This report gives you a list of all vehicles in the Vehicle file and includes equipment details.

Accounting Reports

The Accounting Reports give you information based on the account information you have entered into VersaTrans TripTracker and the trips that have been billed under the accounts.

- *Trip Account Balance:* This report provides account balance information for each account per trip for each fiscal period.
- *Balance Due (Aging)*: This report presents account information aged in categories based on a trip's invoice date. The report includes trips that have been billed, but have not yet been paid in full.
- *Cost Detail*: This report produces a listing of trips by account and all charges associated with the trip.
- *Invoice*: This report allows you to generate groups of invoices at the same time.
- *Trip Payment*: This report will present a list of all payments posted against the invoices for a trip.

Trip Reports

The Trip Reports give you information based on the trip information you have entered into TripTracker:

- *Cancelled Trips*: This report will provide details regarding any trip in a Cancelled status.
- *Driver Trip Sheets*: This report produces a listing of trip sheets for selected trips that can be used for recording pertinent information during the course of a trip.

- *Trip Listing by Account*: This report is a listing of trips summarized by account.
- *Trip Listing Detail*: This report shows the details of each trip. The report can be sorted and filtered by different trip details to present the list of trips you are looking for.
- *Trip Status History*: This report provides a history of a trip as it passes through the significant trip processing stages (Requested, Approved, Rejected, Scheduled, Completed, Billed, Paid, Completed).

Employee Reports

The Employee Reports focus on employee record information you have entered into VersaTrans TripTracker:

- *Certification Listing*: This report lists the details of each employee's certification information and the status of those certifications.
- *Employee Listing*: This report shows the employees you have entered into the system and includes non- confidential personal details.
- *Refused Trip Details*: This report lists the driver related and trip-related information associated with a driver's trip refusal.
- *Summary of Driver Time*: This report shows the trips taken by a driver, the amount of hours by trip and the total number of hours.

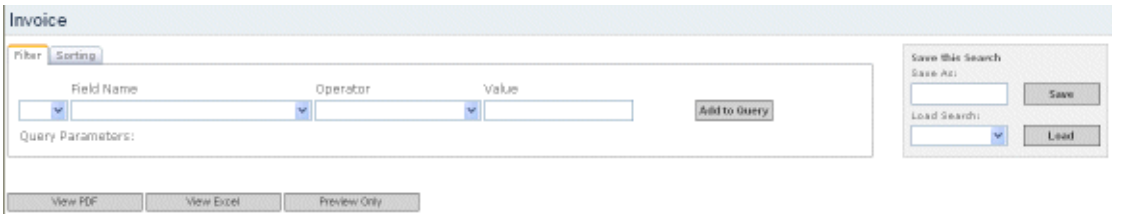
Generating the Reports

Since the report generating process is the same for all reports, we use the Invoice Report as an example.

To generate a report and select its output options:

Path:) Reports > Accounting Reports > Invoice

1. Follow the above path to display the Invoice screen. By default, the Filter tab is displayed.



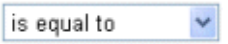
2. Clicking the **VIEW PDF**, **VIEW EXCEL**, or **PREVIEW ONLY** buttons at this point will result in output for all the records (invoices) in the system.

   The filter allows you to select invoices according to specified filter criteria and then generate a report showing the results of that filter.

3. Enter or select information for the following.

   Field Name Account Name

   Click to display a list of invoice field names and select a name from the list (i.e Account Name, Approver, Requester, etc.). The field names in the list will be determined by the type of report that was selected.

Operator 

Click to display a list of operators and select an operator from the list (i.e. is equal to, contains data, etc.).

Depending on the type of operator selected, the Value field may or may not display.

Value

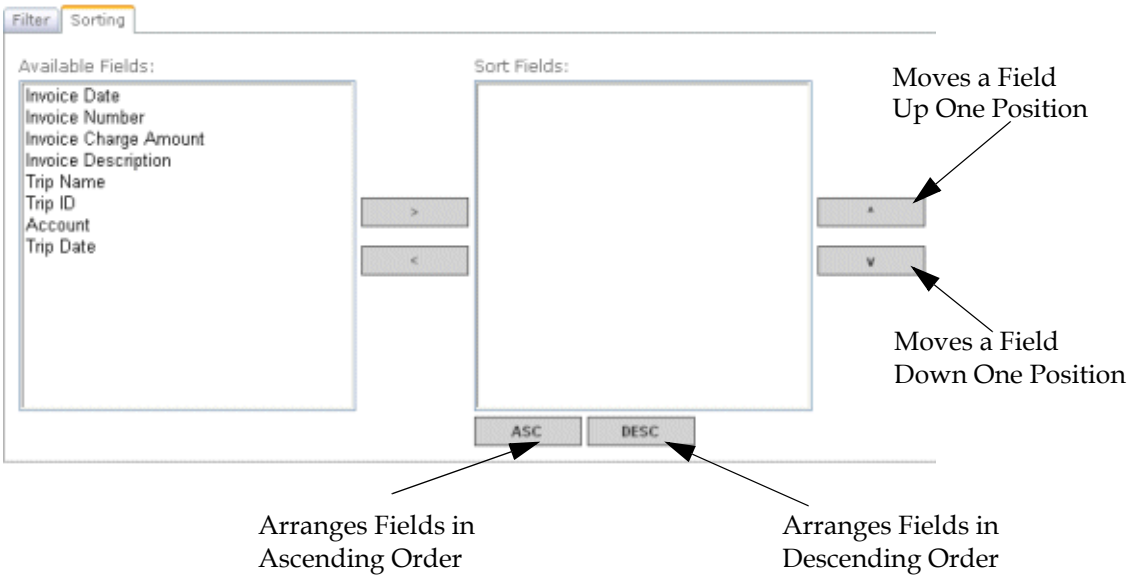
Click to display a list of values and select a value from the list. The values in the list will be determined by the type of report that was selected.

4. Click

to add the query to the filter.

5. To continue adding to the query, click in the Operator field and choose either **AND** or **OR** and enter /select Field Name, Operator, etc. This process can be repeated as often as necessary.

6. You also have the option of sorting on available fields. Click Sorting to display a panel that allows you to select the available fields .Sorting can be used by itself or in conjunction with a filter.



7. Look through the list of available fields and select the field(s) that you want to sort on.
8. Click > and the selected field(s) are moved to the Sort Fields panel. Click < to move field(s) out of the Sort Fields panel.
9. When you are finished selecting and organizing fields for the sort, click Filter to return to the Filter panel.
10. When you are done setting up the filter and/or sort fields, you will want to select an output for the report. If you want to view PDF output, Excel output, or Preview only, click the appropriate Button.

    If you click View PDF, the system displays the report in PDF format. You can save the report in PDF format by clicking .

If you click View Excel, a dialog displays asking if you want to open the file in a Microsoft Excel Worksheet or save the file in Excel.

If you click Preview Only, the system displays the report and you can page through each invoice on the screen. You can print using File > Print or Export the report as a PDF or Excel file using Select a format Export.

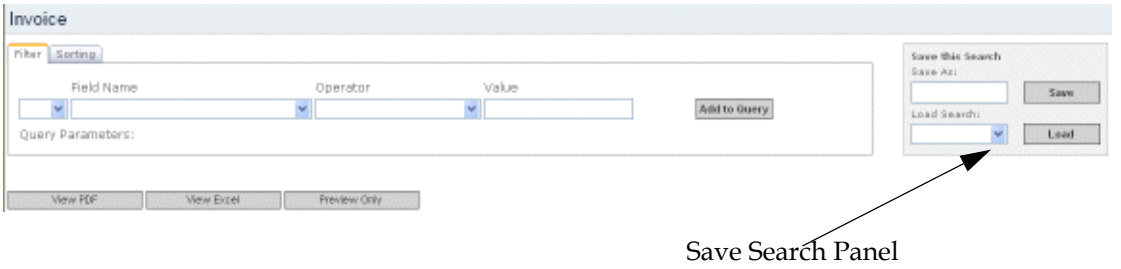
Saving and Using a Saved Report Search

You can save any number of report searches and they will be added to a list for later use.

To save a report search and then use the saved search:

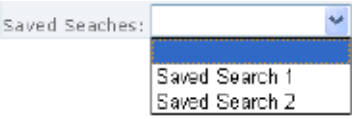
Path:) Reports > Accounting Reports > Invoice

1. Follow the above path to display the Invoice screen. By default, the Filter tab is displayed.



2. Set up and run a report search as described in *Generating the Reports* on page 229.
3. In the **SAVE AS** field, enter a name for the search.
4. Click Save. The search is added to a list accessible from the **LOAD SEARCH** drop-down button.

5. To use a report search that was previously saved, click the **LOAD SEARCH** drop-down button to display a list of saved searches.



6. Select the desired search from the list and click

. The selected search is loaded into the filter.

Appendix A

Setting Up Security & Email

Topics In This Appendix:

Security Overview, 236
Setting Up User Groups & Users, 236
Setting Up a New User, 244
Email Messaging System Overview, 249
Setting Up Email, 251
Setting Up Email Message Templates, 255

Security Overview

User security is a significant issue in the VersaTrans TripTracker system. There are three areas of particular concern:

1. Accounts - Access to budget information and the ability to change these records
2. Employees - Access to sensitive information and the ability to change employee records
3. System Administration - Ability to add and remove privileges and views of the VersaTrans TripTracker system

Setting Up User Groups & Users

We set up a limited administrative user for the VersaTrans TripTracker system to allow you to enter the system. Once you get in, you need to set up the administrative privileges and other user groups for the other types of users who require access to the system. Remember to change the password for the admin account immediately to preserve the security of the VersaTrans TripTracker system. See *Changing Your User Profile* on page 247 for these instructions. However your organization functions, setting up the admin user is your first task.

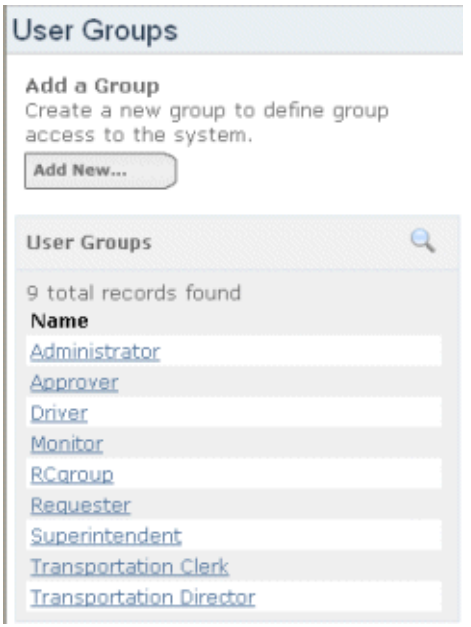
Adding a User Group

User Groups are a way to categorize users and control their access to the functions in VersaTrans TripTracker. Even if only one person is using the VersaTrans TripTracker system, you must create a system administrator's user group. You can establish privileges for other groups as different users with different needs. For example, you might not give an accounting person the same kind of access to VersaTrans TripTracker that you would to a data entry person. Human Resources may need access to the employee records in VersaTrans TripTracker but not to trip scheduling. Since their purpose in using VersaTrans TripTracker is different, their access privileges should be different. User groups help you manage those diverse groups of users.

To add a user group:

Path:) **Admin > User Groups**

1. Follow the above path to display the User Groups screen.



The User Group screen lists all the User Groups currently available in the system.

2. Click Add New... to display the Add a User Group screen.
3. Type "Administrators" or the appropriate name of the group in the **User Group Name** field.
4. Click the scroll bar to scroll up and down the list of privileges.
5. In the Privileges list, click the check boxes of the privileges that you want to assign to this user group and then click Add to save these privileges.

Caution: ***Familiarize yourself with the VersaTrans TripTracker system thoroughly before you choose user group privileges. You could jeopardize the security of the VersaTrans TripTracker system if you do not understand these privileges.***

For any non-administrator-type user, carefully review the options in the list and weigh which kinds of users need to have access to each right. Click each check box that applies to the whole group.

If a particular person needs privileges slightly different from others in his or her group, select another user group to differentiate that user. We recommend that you do not grant privileges to a whole group based on what one or two people in the group require.

You can refer to the following security definitions when setting up your user groups.

Administration

Administrator: Options
Enables access to: System Options and System Email Options.

Administrator: Super User
Enables access to all functionality within VersaTrans TripTracker.

If you are a super user, you can override any thresholds defined in the System Options.

System Lists: Edit
Enables access to: Activity Types, Certifications, Charge Basis, Drug Test Types, Employee Titles, Employee Types, Fiscal Periods, Invoice Charges, Job Categories, Trip Locations, Trip Types.

User: Accounts Edit
Enables access to: User Setup for creating and editing users within the system.

User: Groups Edit
Enables access to: User Groups for creating and editing user groups within the system.

Employees

These permissions enable access to specific pieces of functionality within the employee records.

Employees: Edit Calendar
Enables access to viewing/editing data on the employee's calendar.

Employees: Edit Certifications
Enables access to viewing/editing certifications for employees.

Employees: Edit Details
Enables access to editing general information provided in the employee record.

Employees: Edit Drug Tests
Enables access to viewing/editing drug test information for employees.

Employees: Edit Pay Rate
Enables access to viewing/editing salary information for employees.

Employees: Edit Seniority
Enables access to editing seniority rankings among employees.

Reports

Reports: Accounting
Enables access to: Account Balance Report, Balance Due (Aging Report), Cost Detail Report, Invoice Report, Trip Payment Report.

Reports: Edit
Enables access to the Report Editor for creating customized reports.

Reports: Employees
Enables access to: Certification Listing Report, Employee Listing Report, Refused Trip Detail Report, Summary of Driver Time Report.

Reports: Listing View
Enables access to: Accounts Report, Buildings Report, Trip Locations Report, Vehicles Report.

Reports: Trip
Enables access to: Cancelled Trips Report, Driver Trip Sheet Report, Trip Listing by Account Report, Trip Listing Detail Report, Trip Status History Report.

Transportation

Within the Calendar, these permissions enable a user to access notes or view the calendar.

- Transportation Calendar: Add Notes

- Transportation Calendar: Delete Notes

- Transportation Calendar: Edit Notes

- Transportation Calendar: View

Miscellaneous

Miscellaneous: Change Password
Enables access to: allow individual users to change their login password.

Trip Requests

Within the Trip Request process, these permissions enable a user to access data on the closed trips page.

- Closed Trips: Close
- Closed Trips: Edit
- Closed Trips: View

Within the Trip Request process, these permissions enable a user to access data on the approve trips page.

- Trip Approval: Approve or Reject
- Trip Approval: Cancel
- Trip Approval: Edit
- Trip Approval: View

Within the Trip Request process, these permissions enable a user to access data on the trip completion page.

- Trip Completion: Add Trip Completion Info
- Trip Completion: Edit
- Trip Completion: View

Within the Trip Request process, these permissions enable a user to access data on the trip invoicing page.

- Trip Invoicing: Create
- Trip Invoicing: Edit
- Trip Invoicing: View

Within the Trip Request process, these permissions enable a user to access data on the trip payments page.

- Trip Payments: Create
- Trip Payments: Edit
- Trip Payments: View

Within the Trip Request process, these permissions enable a user to access data on the trip request page.

- Trip Request: Cancel
- Trip Request: Create

Trip Request: Create For Other Requestors
If you have the correct security privileges, you can request trips and edit requested trips on behalf of other individuals that are considered Requesters.

When this privlege is checked, you can request either for yourself or for other employees. You will still only have access to the accounts listed on the User Record but can then choose the name of any of the requesters associated with the account.

- Trip Request: Edit

- Trip Request: View

Trip Request: Express Trips
Enables the user to automatically approve the trip and go straight to the scheduling stage. This would typically be used by someone in the Transportation office only.

Trip Request: View All Trips
Enables the user to search for and view trips associated with any account that the user has access to.

Within the Trip Request process, these permissions enable a user to access data on the trip scheduling page.

- Trip Scheduling: Cancel
- Trip Scheduling: Edit
- Trip Scheduling: Schedule
- Trip Scheduling: View

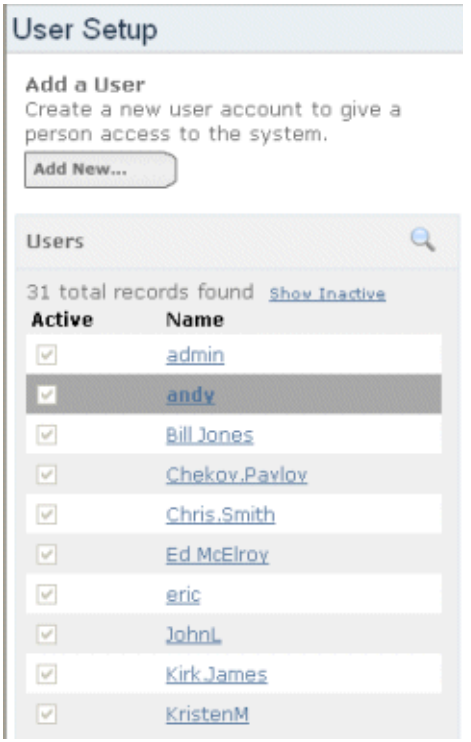
Setting Up a New User

The User Setup feature described below allows clerks or administrators to create new users and passwords, as well as assign new users to accounts and user groups. The user group the user is assigned to determines what options and data the user is able to access. Access to certain functionality and data are restricted to those items included in the user group's respective security privileges. See, *Adding a User Group* on page 237.

To setup a new user:

Path:) **Admin > User Setup**

1. Follow the above path to display the User Setup screen.



The User Setup screen lists all the Users currently available in the system.

2. Click **Add New...** to display the Add a User screen.

3. Enter the username

4. Enter a password. By default the password must be at least 5 characters long and adhere to the "***Min special characters in password***" and "***Min characters in password***" settings as specified in the VersaTrans TripTracker Configuration Utility.
5. Click Active or Inactive.
6. *Optional.* Click in the Employee field and select an employee that this user login corresponds to. The security question and answer fields will be displayed at the bottom of the screen.
7. Click in the Group field and select the group that you want the user assigned to. The Group that the user is assigned will determine that users security privileges.
8. In the Accounts section, select the account(s) that you want the user assigned to.
9. *Optional.* Enter a valid e-mail address where you want your password sent in the event that it is forgotten.

   Note: *This e-mail address is also used for sending trip messages to Users/Employees who are added to the Contacts/Requestors tab of an account.*

10. Enter the same e-mail address again in the **Confirm Email** address box.
11. *Optional.* Click the drop-down button in the **Choose Security Question** box to display a list of security questions. Choose a security question.
12. Enter an answer for the security question in the **Answer Security Question** box.
13. Click

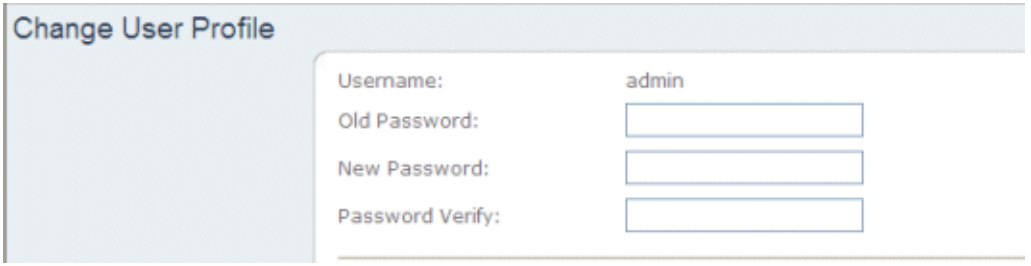
to save the data.

Changing Your User Profile

To change your user profile:

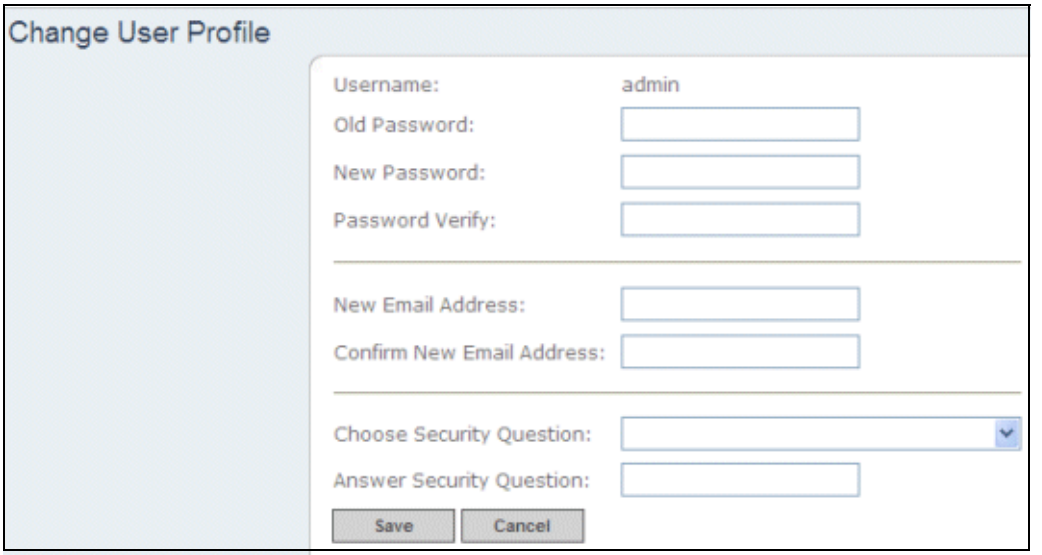
Path: Admin > Change User profile

1. Follow the above path to display the Change User profile screen.



2. Type your Old Password, New Password and new password again in the corresponding fields.
3. Click Save and you will receive a message that your password was updated successfully.

If you have enabled password retrieval, (see, *Setting the System Options* on page 9) the following screen displays.



4. You have the additional option of entering a new email address and/or security question and answer.
5. Click Save and you will receive a message that your email address and/or security question and answer was updated successfully.

Email Messaging System Overview

You can manage who gets what email messages and when they get them. Here are some questions you might ask yourself when you set up your VersaTrans TripTracker messaging strategy:

Who gets email?

In the Email Options screen, we have set up the user roles (Requesters, Approvers, etc.) that determine who can receive email notifications pertaining to the stages of a requested field trip. The following user roles could potentially get email.

Account Contacts

Here you can establish at what stage in the trip precess the person financially responsible for an account is notified of important budget events.

Requesters and Approvers

You determine at what stages the system can email the trip Requesters and Approvers. When you select an option in this list, the system can send email messages for that stage. If you do not select an option in this list, emails cannot be sent for that stage. You can select different options for Requesters than you do for Approvers.

Scheduler

You can determine whether a Scheduler receives an email when there is a trip to schedule and when a trip is canceled.

Billing Clerk

You can determine whether a Billing Clerk receives an email when there is a trip ready for billing and when a trip is canceled.

Driver/Monitor/Aide

You can determine whether a driver/monitor/aide receives an email when a trip is scheduled to them and when a trip is canceled.

When does email get sent?

As trip moves through the trip request process (submission, approval, scheduling etc.) the options that you selected on te email options screen will determine the employees who receive email and the content of that email. The content of the email can be the default message template content or a message template that you have customized (see, *Setting Up Email Message Templates* on page 255).

An email address is entered when you add an employee record. See, *Adding an Employee Record* on page 139.

Setting Up Email

We have created an email system which notifies parties involved with the field trip about the status of the trip automatically (according to your email option settings).

To use the messaging capabilities of VersaTrans TripTracker, you must first perform the following tasks in the order presented below:

1. *Adding a User Group* on page 237
2. *Setting Up a New User* on page 244
3. *Adding Account Records* on page 64
4. *Adding Contacts/Requesters to an Account Record* on page 71
5. *Setting Up Approval Paths* on page 162
6. *Specifying Who Gets Email and At What Stages* on page 251.
7. *Searching for and Entering Email Addresses* on page 252
8. *Setting Up Email Message Templates* on page 255

Make sure to complete steps 1 through 5 before you begin steps 6 through 8 described in the section below.

Specifying Who Gets Email and At What Stages

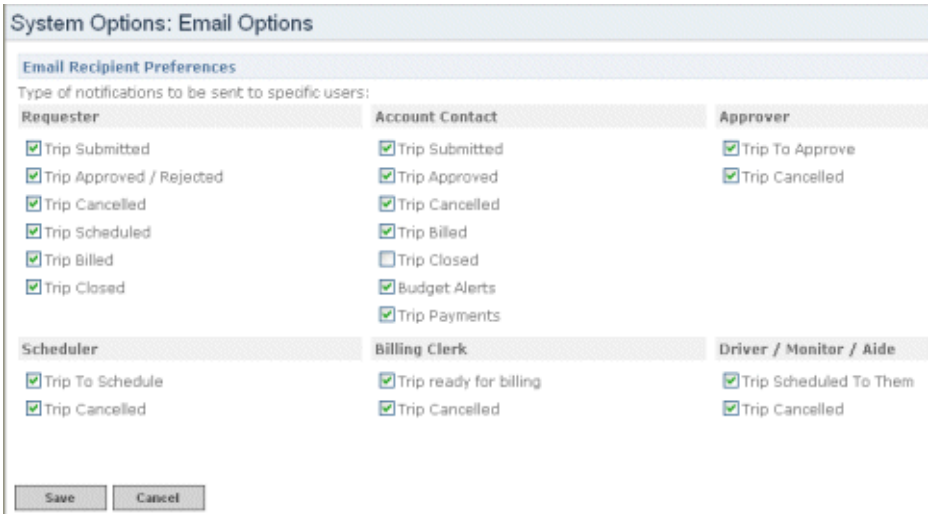
The Email Options screen allows you to identify who gets messages and at what stages. Recipients in this case are Requesters, Account Contacts, Approvers, Schedulers, Billing Clerks and Drivers/Monitors/Aides.

> ***Note:*** *This should be the first place you check if an employee is having issues with receiving e-mails. These options are global and will apply to the entire system.*

To specify who gets email and at what stages:

Path:) **Admin > System Email Options**

1. Follow the above path to display the System Options: Email Options screen.



2. For each type of recipient you want to send email to (Requester, Approver, etc.), place a check in each check box to represent the emails you want to send.

   For example, if you want Requesters to be sent emails when the field trip is scheduled but not when it is approved/rejected, click the Trip Scheduled box but not the Trip Approved/Rejected box.

3. Click Save to save your selections.

Searching for and Entering Email Addresses

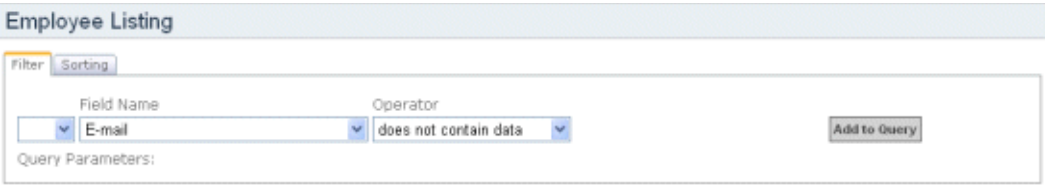
Before an employee can receive an email notification, they must have an

email address entered in their employee record. The quickest way to identify employees without email addresses is to perform a search which is described below. Once you have a list of employees, you can open their records and enter email addresses.

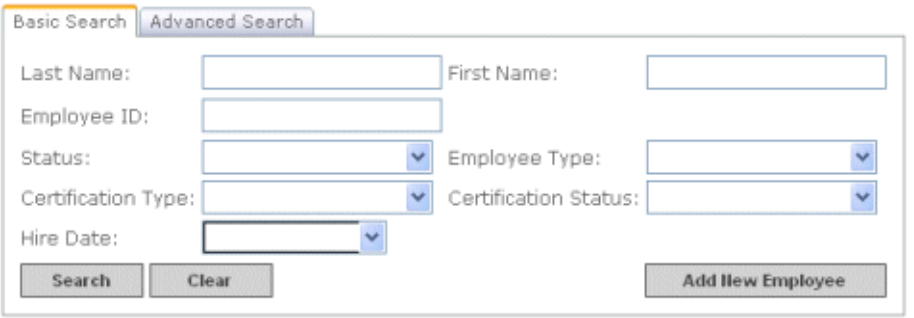
To search for and enter email addresses:

Path:) Reports > Employee Reports > Employee Listing

1. Follow the above path to display the Employee Listing screen.



2. Click the **Field** drop-down button and select **Email**.
3. Click the **Operator** drop-down button and select **does not contain data**.
4. Click View PDF to get a report of employees without email addresses.
5. Go to Admin > Employees to display the Employees screen.



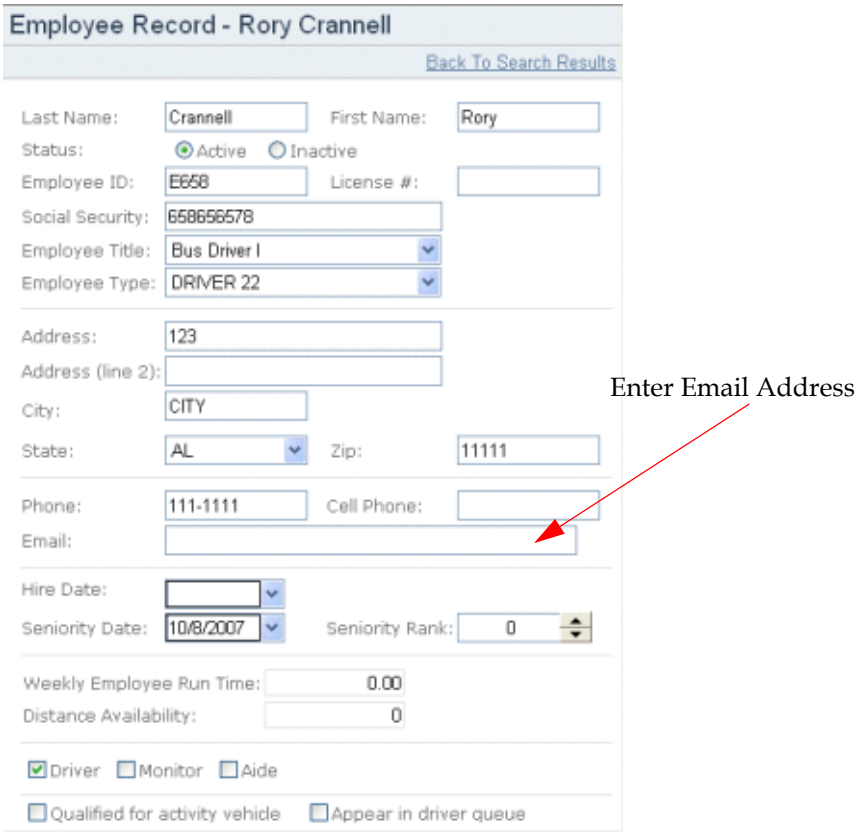
6. Enter an employee's information from the report list generated in step 4.
7. Click Search to display the employee search results.

Search Results

Employee ID	Employee Name	Status	Home Phone	Employee Type
E658	Crannell, Rory	Active	111-1111	DRIVER 22

8. Click on the employees name to display that employee's record.

.



9. Enter an email address and make sure that all the ohter fields have the required entries.
10. When you are finished making entries, click Update .

Setting Up Email Message Templates

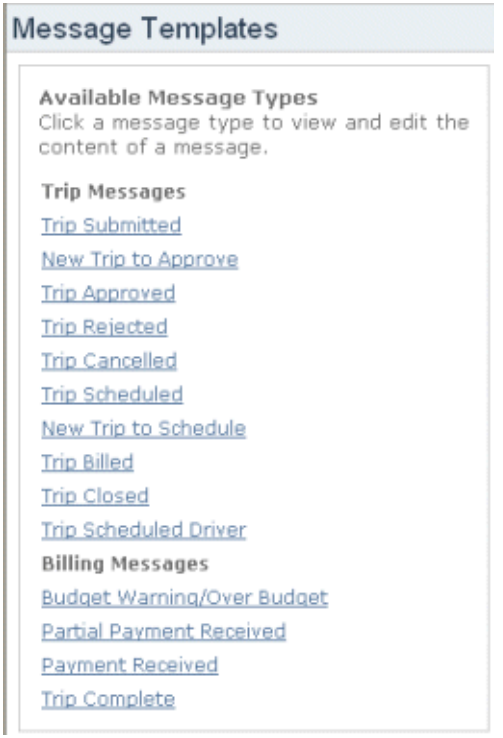
The email system is one of the unique features of VersaTrans TripTracker that make it so helpful. We have created an email system which notifies parties involved with the field trip about the status of the trip automatically (according to your email option settings). Message templates allow you to set up email structures to keep involved parties informed of the trip request status and allow you to complete and bill the account.

Displaying and Editing the Contents of an Email Message

To display and edit the contents of an email message:

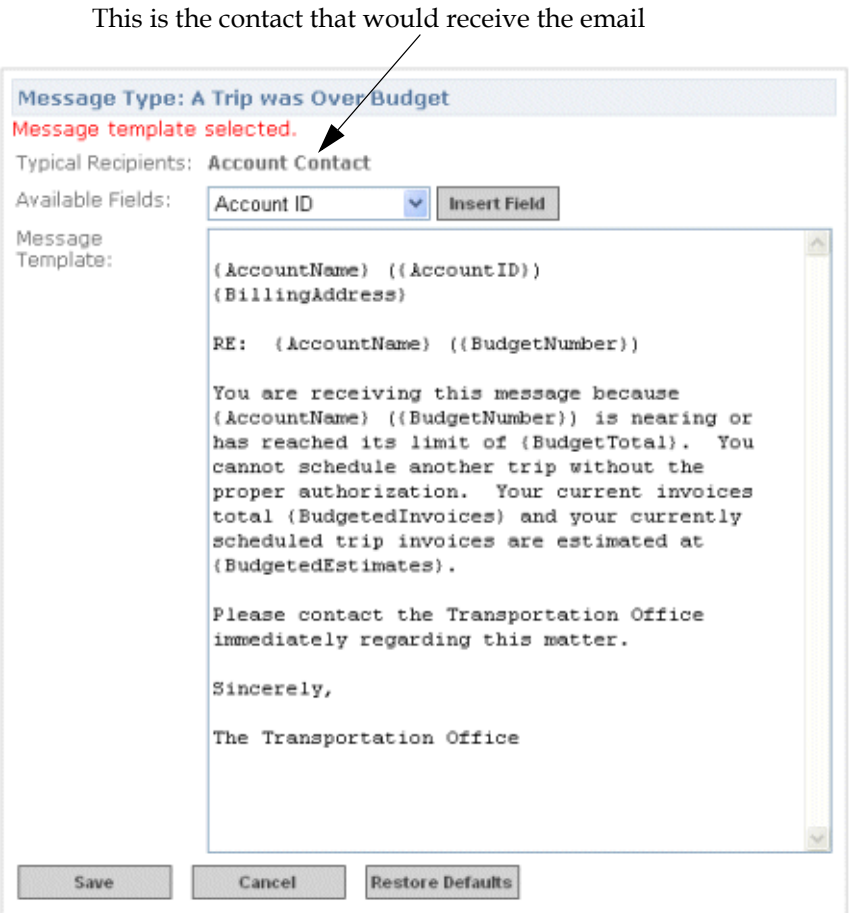
Path:) **Admin > Message Templates**

1. Follow the above path to display the Message Templates screen.



The Message Template screen lists the available message types. You can use the default template as is or customize the template. Only one message template of each type can be saved and made available. At any time you change the contents of the message or restore it back to its default format.

2. Click a message type to display and edit the contents of a message. For example, click Budget Warning/Over Budget to display a *trip was over budget* template.


This is the contact that would receive the email
Message Type: A Trip was Over Budget
Message template selected.
Typical Recipients: Account Contact
Available Fields:
Account ID
Insert Field
Message Template:
(AccountName) ((AccountID))
(BillingAddress)
RE: (AccountName) ((BudgetNumber))
You are receiving this message because (AccountName) ((BudgetNumber)) is nearing or has reached its limit of (BudgetTotal). You cannot schedule another trip without the proper authorization. Your current invoices total (BudgetedInvoices) and your currently scheduled trip invoices are estimated at (BudgetedEstimates).
Please contact the Transportation Office immediately regarding this matter.
Sincerely,
The Transportation Office
Save
Cancel
Restore Defaults

You may want to customize the message and take out or add information to the template.

3. You can insert fields in the template by first selecting a field from the Available Fields drop-down list and then placing the cursor where you want to insert the field and clicking Insert Field.

   You can edit the body of the template as you would with any text editor.

Note: *The information in brackets {...}, for example* `{AccountName}`*, will be converted to data defined on the trip (assuming it is a field in the selection list).*

4. Enter the `{AccountName} ({AccountID})` codes so the system can pull that data directly from the account record.
5. At anytime, you can click Restore Defaults to restore the template to it's default format.
6. Click Save to save the template. The resulting email might look like this:

From: VersaTransTripTracker@versatrans.com
Sent: Thursday, October 04, 2007 6:19 AM
To: Linda Woodard
Subject: A Trip was Over Budget

Parent-Teacher Association (22)
144 Main Street Latham, NY 12801

RE: Parent-Teacher Association (1452)

You are receiving this message because Parent-Teacher Association (1452) is nearing or has reached its limit of $3,500.00. You cannot schedule another trip without the proper authorization. Your current invoices total $7,000.35 and your currently scheduled trip invoices are estimated at $111.25.

Please contact the Transportation Office immediately regarding this matter.

Sincerely,

The Transportation Office

Appendix B

Backing Up, Restoring & Importing Data

Topics In This Appendix:

Backing Up & Restoring Data, 262
Using the Import Utility, 267

Backing Up & Restoring Data

We provide the Database Console for SQL Server as part of VersaTrans TripTracker. This utility is intended to be a tool for the system administrator and does not have to be installed on each workstation. You use this utility to run database backups and restores and make any database update changes that are required. Currently, the database cannot be backed up from within VersaTrans TripTracker.

Caution: ***VersaTrans RP and VersaTrans TripTracker data are stored in the same database. If you have both products, careful consideration should be given to restoring the database to prevent data loss. If you restore the database, you are actually restoring the data for both products.***

If you have VersaTrans FleetVision integrated with VersaTrans RP and versaTrans TripTracker, you need to carefully consider database backups as well. VersaTrans FleetVision resides in a separate database from VersaTrans RP and TripTracker data. Therefore, any changes made to shared data (Employees, Vehicles, Certifications) could become out of synch if you restore an older database for just one of these products.

Backing up Using Database Console for SQL Server

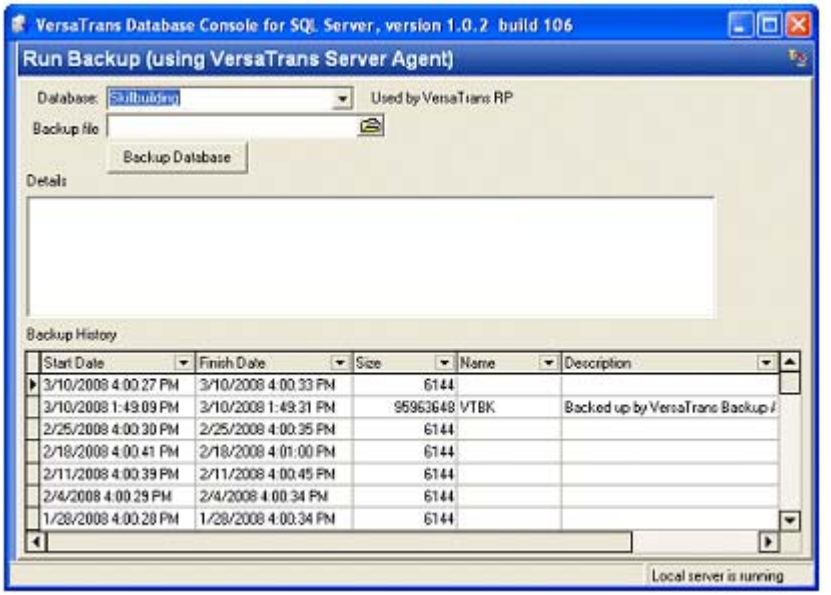
To back up and restore your data using the ToolMS utility, open the VersaTrans TripTracker Database Console for SQL Server. Create a separate backup directory for the database zip file before you begin the process.

To back up VersaTrans TripTracker data:

Path:) Start > Programs > VersaTrans Suite > Common > Database Console for SQL Server

If you selected a different Program Manager Group during the installation, this path may be different.

1. In the VersaTrans Database Console, check the server name and verify there is a saved value for username and password.
2. Click the Connect button and the connection is established.
3. Click the **RUN BACKUP** button in the left side of the console to display the Run Backup screen.



4. Select the appropriate database from the Database drop-down list.
5. In the Backup File field, create or navigate to the backup directory.
6. Click the Backup Database button. The system backs up the database into a zip file and shows the results in the Backup History box.

Restoring Your Data from a Backup Using Database Console for SQL Server

Once you back up your data, you can restore it from the database server computer or from one of the client systems. Choose these options carefully to ensure you do not overwrite the wrong database.

> ***Note:*** *Due to permissions and user rights access, it is highly recommended that the database be restored on the server where it is installed.*

Caution: ***When restoring the VersaTrans RP and VersaTrans TripTracker datasets that are used for VersaTrans e-Link, you must also stop and re-start the e-Link Web Service (eWS).***

To restore VersaTrans TripTracker data:

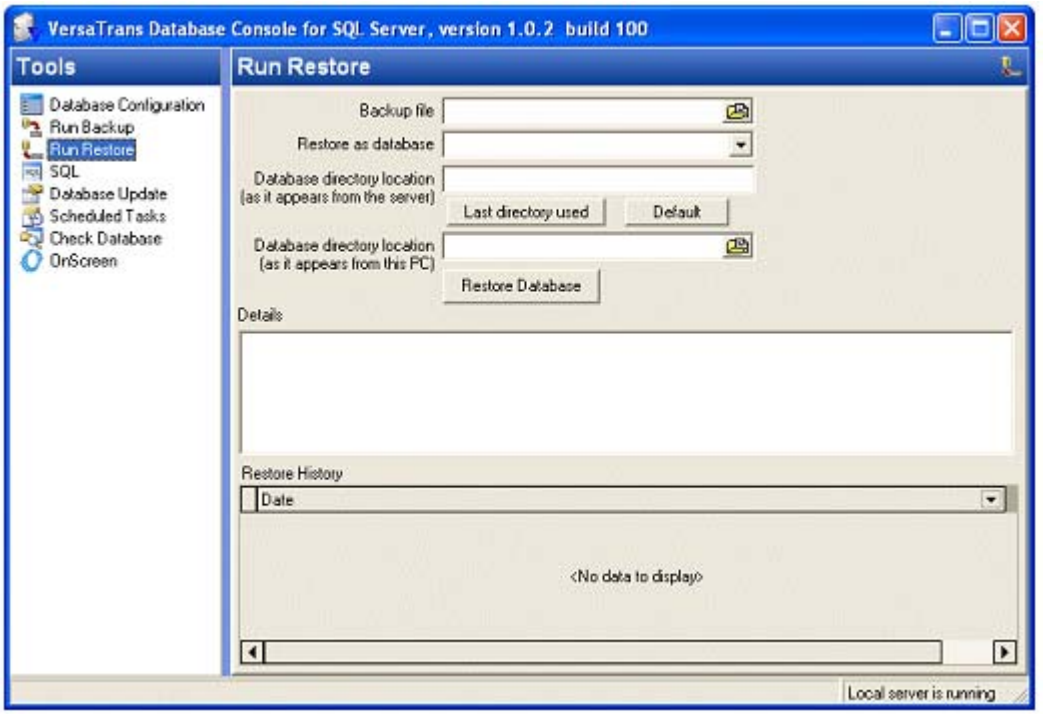
Path:) Start > Programs > VersaTrans Suite > Common > Database Console for SQL Server

> ***Note:*** *If you selected a different Program Manager Group during the installation, this path may be different.*

1. In the VersaTrans Database Console for SQL Server, check the server name and verify there is a saved value for User Name and Password.
2. Enter your Username and Password. If you have installed SQL Server Express from the VersaTrans TripTracker CD, your Username is **sa** and your password is **vtrans**.

   If you have installed SQL Server prior to the VersaTrans TripTracker installation, you will need to obtain your password and user information from your system administrator.

3. Click the **CONNECT** button to connect to the server.



4. Complete the selections in this screen.

Backup File
Locate the backup file (either BAK or .ZIP file) you want to restore using the Backup File .

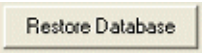
Restore as Database
Select the database you want to restore in this backup into. You may not have more than one. If you are restoring to the same database that displays in this drop-down list, the Database Path from Database Server field does not enable.

Database Path from Database Server

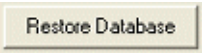
If this field is enabled, use the button to select the (drive mapped) path of the database server.

Database Location

If you are restoring the database from the database host system, this path will be the same as the one you selected in the previous field. If you are restoring the database from a client computer, use the button to select the (drive mapped) path from the client computer to the database server.

5. Click  to begin the restore process. If you select a different database than the system expects, the system prompts you to confirm that you want to overwrite one database with the other. Click **YES** to confirm or **NO** to select another database.

   Note: *When restoring a database in Vista, you may receive a message saying, "Could not create database path … and then the name of the path" (for example, C:\Program Files\Microsoft SQL Server\MSSQL). You will need to grant yourself full control of the MSSQL folder in order to perform the restore.*

6. When the system has completed the restoration, the message *Restore Complete* displays in the text box below the  button.

Using the Import Utility

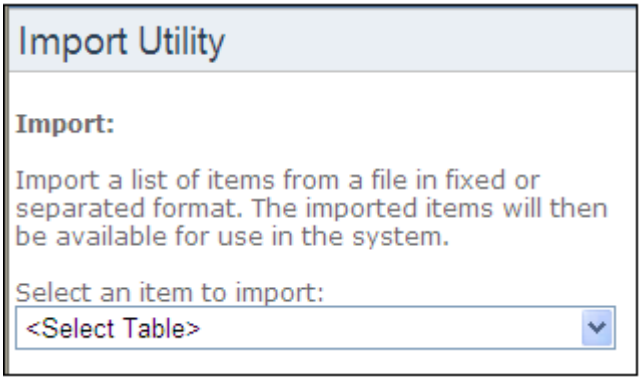
The VersaTrans TripTracker import utility allows you to import buildings, vehicles, employees, locations, accounts and accounts/contacts/requesters/drivers. The files can be .txt, .csv, .asc, or .tab in either fixed or delimited format. When the import is complete, this information will be available for use in the system.

Importing Items Using a Fixed Format

To import Items using a fixed format:

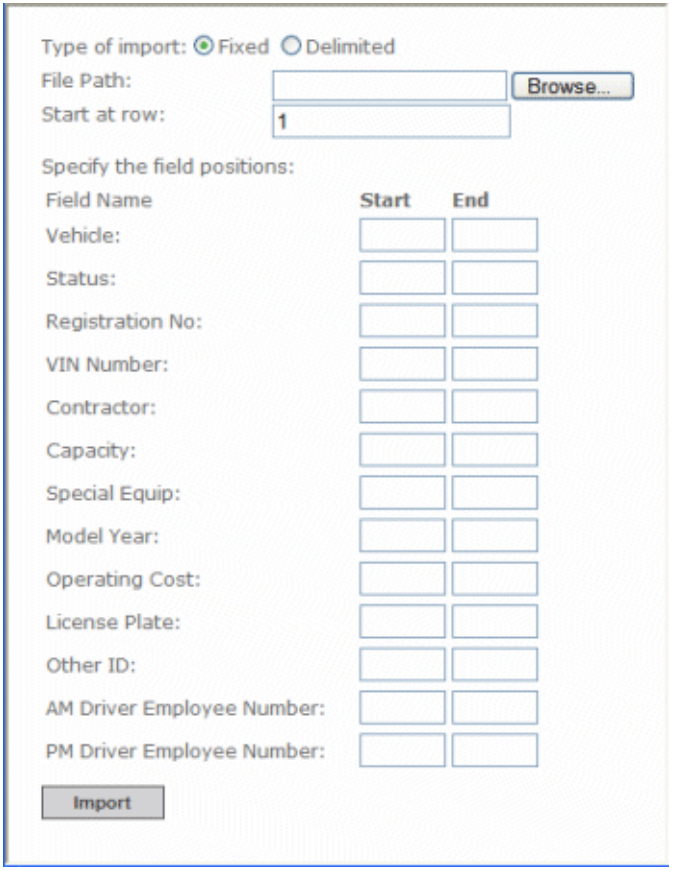
Path:) **Admin > Import Utility**

1. Follow the above path to display the Import Utility screen.


Import Utility
Import:
Import a list of items from a file in fixed or separated format. The imported items will then be available for use in the system.
Select an item to import:
<Select Table>

2. Click to display **Buildings**, **Vehicles**, **Employees**, **Locations**, **Accounts** or **Account Contacts/Requesters/Drivers** in the drop-down list. The procedure for importing is the same for all selections. We will be importing vehicles for our example.

3. Select **Vehicles** to display the import options for vehicles as shown below.



4. Selected **Fixed** for the type of import. For more information see, *Creating Fixed Width Files Used for Importing Data* on page 280.

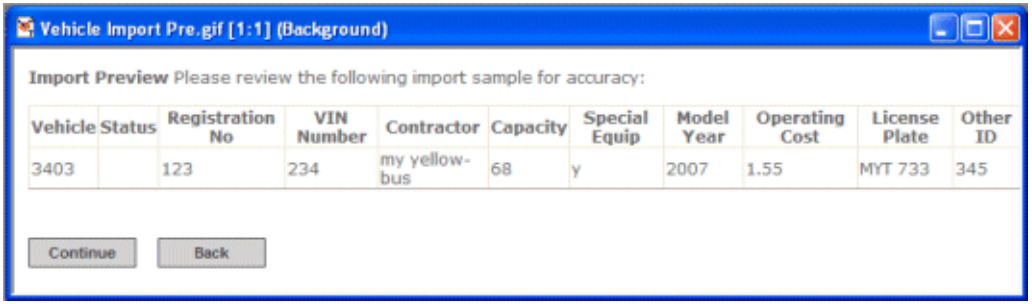
5. Click Browse... and locate the file that you want to import.

6. Enter the row that you want to start at in the **START AT ROW** field.

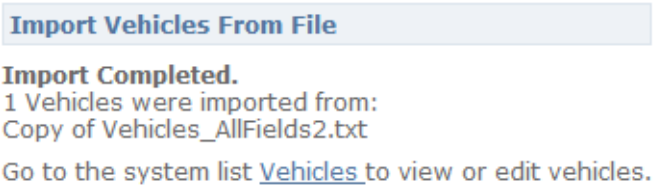
If there isn't a header line, set the number to 1. Otherwise, enter the number that corresponds to the first row of valid data.

Specify the field positions
In the **Start** and **End** boxes, enter how long the fields should be. For example, if the vehicle starts in the first column of the file and it is ten characters in length, enter 1 in the **Start** box and 10 in the **End** box.

7. You do not need to enter Start and End values for every field. Only enter values for the required fields and the fields you are importing.
8. Click Import to start the importing process. You will be able to preview a sample of your file for accuracy.
9. Click Continue to begin the import process. This will show you the first 10 rows of data in your import file.



10. If there are errors, you can correct the errors in the file that you are importing. When the errors have been corrected, select the file and perform the import again. When your import is successful, you will receive a message indicating how many vehicles were imported.


Import Vehicles From File
Import Completed.
1 Vehicles were imported from:
Copy of Vehicles_AllFields2.txt
Go to the system list Vehicles to view or edit vehicles.

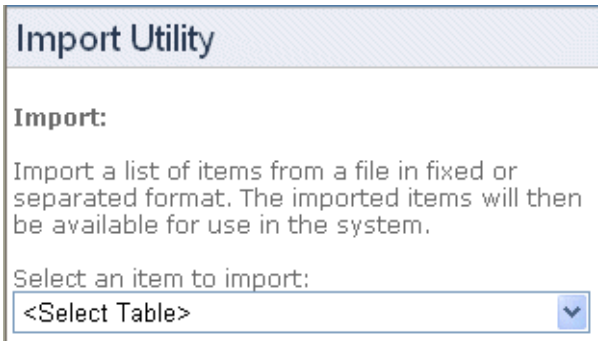
Importing Items Using a Delimited Format

The procedure is the same for importing **Buildings**, **Vehicles**, **Employees**, **Locations**, **Accounts** or **Account Contacts/Requesters/Drivers** from the drop-down list. We will be importing vehicles for our example.

To import items using a delimited format:

Path:) Admin > Import Utility

1. Follow the above path to display the Import Utility screen.


Import Utility
Import:
Import a list of items from a file in fixed or separated format. The imported items will then be available for use in the system.
Select an item to import:
<Select Table>

2. Click and select **Vehicles** from the drop-down list.

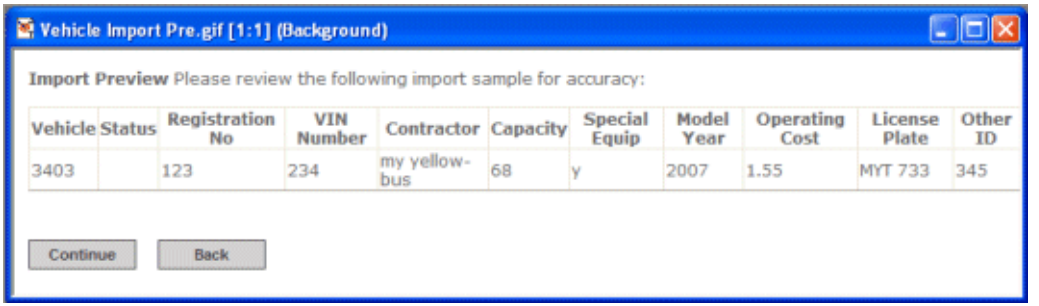
3. Selected **Delimited** for the type of import. For more information see, *Creating the Delimited Files Used for Importing Data* on page 273

4. Click and locate the delimited file that you want to import.

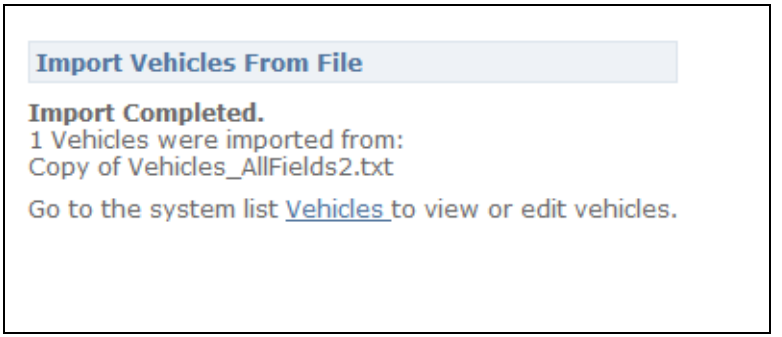
5. Specify the row number that the data in the file begins at (do not count the row that defines the fixed definitions). This defaults to one. Typically this value does not change.

6. Select the type of delimiter that was used for creating the file that is being imported Tab, Semicolon, Comma, or Other).

7. Click Import to start the importing process. You will be able to preview a sample of your file for accuracy.
8. Click Continue to begin the import process. This will show you the first 10 rows of data in your import file.



9. If there are errors, you can correct the errors in the file that you are importing. When the errors have been corrected, select the file and perform the import again. When your import is successful, you will receive a message indicating how many vehicles were imported.


Import Vehicles From File
Import Completed.
1 Vehicles were imported from:
Copy of Vehicles_AllFields2.txt
Go to the system list Vehicles to view or edit vehicles.

Creating the Delimited Files Used for Importing Data

In order for VersaTrans TripTracker to know what values to populate into which fields in the database, you MUST include a header in your delimited file that defines the fields that you are importing. The system expects the field names to be defined as follows. The field names are not case-sensitive.

** indicates a required field for the import*

Buildings

Table 1.

Screen Name	Delimited Field Name
*Name	Name
*Building Number	BuildingCode
Address 1	Address1
Address 2	Address2
City	City
State	State
Zip	PostalCode
Status	Active*(Values = Y/N)*
Abbreviation	Abbrev
Contact First Name	FirstName
Contact Last Name	LastName
Title	Title
Email	Email

Table 1.

Screen Name	Delimited Field Name
Phone	PhoneNumber
Fax	Fax

Note: *You do not need to import values for each of these fields. VersaTrans TripTracker will populate just the fields that you define in your import.*

A sample delimited file might look like this:

Name,BuildingCode,Address1,Active,Abbrev
Elm Street Elementary,4590,12 Elm Street,Y,ESE

Vehicles

Table 2.

Screen Name	Delimited Field Name
*Vehicle	Vehicle
Status	Active *(Values = Y/N)*
Registration No	RegistrationNo
VIN Number	VIN
Contractor	Contractor
Capacity	Capacity
Special Equipment	SpecialEquipment
Model Year	ModelYear
Operating Cost	CostPerMile
License Plate	Plate1
Other ID	SerialNo

Table 2.

Screen Name	Delimited Field Name
AM Driver Employee No	AMDriverID
PM Driver Employee No	PMDriverID

** indicates a required field for the import*

Note: *You do not need to import values for each of these fields. VersaTrans TripTracker will populate just the fields that you define in your import.*

A sample delimited file might look like this:

Vehicle,Active,Contractor,Capacity,ModelYear
3402,Y,My Yellow Bus,65,2004

Employees

Table 3.

Screen Name	Delimited Field Name
*First Name	FirstName
*Last Name	LastName
*Employee ID	EmployeeNo
License #	DrivLicense
Social Security	SSN
Employee Title	EmployeeTitleID
Employee Type	EmployeeTypeID
Address 1	Address 1
Address 2	Address 2
City	City

Table 3.

Screen Name	Delimited Field Name
State	State
Zip	PostalCode
Phone	HomePhone
Cell Phone	CellPhone
Email	Email
Hire date	HireDate
Seniority Date	SeniorityDate
Weekly Employee Run Time	WeeklyEmployeeRunTime
Distance Availability	DistanceAvailability
Status	Active *(Values = Y/N)*
Driver	IsDriver *(Values = Y/N)*
Monitor	IsMonitor *(Values = Y/N)*
Aide	IsAide *(Values = Y/N)*
Qualified for activity vehicle	QualifyForActivityVehicle *(Values = Y/N)*
Multi-Day Trips	MultiDayTrips *(Values = Y/N)*
Notes	Notes
Non-Transportation Employee	NonTransportationEmployee *(Values = Y/N defaults to Y if not specified)*
Birth Date	BirthDate

** indicates a required field for the import*

Note: *You do not need to import values for each of these fields. VersaTrans TripTracker will populate just the fields that you define in your import.*

A sample delimited file might look like this:

FirstName,LastName,EmployeeNo,HireDate,Active
Michael,Walton,8974,10/10/02,Y

Trip Locations

Table 4.

Screen Name	Delimited Field Name
*Location Name	LocationName
Status	Active *(Values = Y/N)*
Location Type	**LocationTypeID
Address1	Address1
Address2	Address2
City	City
State	StateProvince
Zip	PostalCode
Country	Country
Contact Name	ContactName
Phone	Phone
Directions	Directions

* *indicates a required field for the import*

** 1=billing location; 2=origin only; 3=destination only; 4=origin or destination. If unspecified 3 is the default.

Note: *You do not need to import values for each of these fields. VersaTrans TripTracker will populate just the fields that you define in your import.*

A sample delimited file might look like this:

LocationName,Active,Address1,ContactName,Phone,Directions
Art Museum,Y,123 Main Street,Anne Arthur,555-1234,Take I-90 East to Exit 54 right turn off of ramp onto Main Street

Accounts

Table 5.

Screen Name	Delimited Field Name
*Name	Name
Building ID	Building
Budget Number	Budget Number
Address1	Address1
Addres 2	Address2
City	City
State	State
Zip	PostalCode
Budget Threshold	BuidgetThreshold
Charge Basis	DefaultChargeBasis
Approval Path	ApprovalPath
Account Instructions	Account Instructions
Status	Active *(Values = Y/N)*
External Account	ExternalAccount *(Values = Y/N)*

* *Indicates a required field for the import*

Note: *You do not need to import values for each of these fields. VersaTrans TripTracker will populate just the fields that you define in your import.*

A sample delimited file might look like this:

Name,Active,Building,BudgetNumber,Address1,Address2,City,State,Postal Code,BudgetThreshold,DefaultChargeBasis,ApprovalPath,AccountInstructionsAccount1,Y,BuildingName,123,111 Main St,PO Box111,Anytown,NY,12111,999.50,ChargeBasis,ApprovalPath,Instructions

Account Contacts/Requesters/Drivers

Table 6.

Screen Name	Delimited Field Name
*Account Name	TransportationAccount
Employee Number	EmployeeNumber
**Is Contact	IsContact*(Values = Y/N)*
**Is Requester	IsRequester *(Values = Y/N)*
**Is Driver	IsDriver *(Values = Y/N)*

* *Indicates a required field for the import*

** *At least one of these fields needs to be "Y" for an import to take place*

Note: *You do not need to import values for each of these fields. VersaTrans TripTracker will populate just the fields that you define in your import.*

A sample delimited file might look like this:

TransportationAccount,EmployeeNumber,IsContact,IsRequester,IsDriver

Account1,1,N,N,Y

Account1,2,N,Y,N
Account1,3,Y,Y,N

Note: *The Employee number and Account must exist (previous import etc.) before you can import Account Contacts/Requesters/Drivers.*

Creating Fixed Width Files Used for Importing Data

The system expects the field names to be defined as follows. The field names are not case-sensitive.

Buildings

Table 7.

Screen Name
*Name
*Building Number
Address 1
Address 2
City
State
Zip
Status *(Values = Y/N)*
Abbreviation
Contact First Name
Contact Last Name
Title

Table 7.

Screen Name
Email
Phone
Fax

** indicates a required field for the import*

Note: *You do not need to import values for each of these fields. VersaTrans TripTracker will populate just the fields that you define in your import.*

Vehicles

Table 8.

Screen Name
*Vehicle
Status
Registration No
VIN Number
Contractor
Capacity
Special Equipment
Model Year
Operating Cost
License Plate
Other ID

Table 8.

Screen Name
AM Driver Employee No
PM Driver Employee No

* indicates a required field for the import

Note: *You do not need to import values for each of these fields. VersaTrans TripTracker will populate just the fields that you define in your import.*

Employees

Table 9.

Screen Name
*First Name
*Last Name
*Employee ID
License #
Social Security
Employee Title
Employee Type
Address 1
Address 2
City
State
Zip
Phone
Cell Phone
Email
Hire date
Seniority Date
Weekly Employee Run Time
Distance Availability
Status *(Values = Y/N)*

Table 9.

Screen Name
Driver *(Values = Y/N)*
Monitor *(Values = Y/N)*
Aide *(Values = Y/N)*
Qualified for activity vehicle *(Values = Y/N)*
Multi-Day Trips *(Values = Y/N)*
Notes
Non-Transportation Employee *(Values = Y/N defaults to Y if not specified)*
Birth Date

* *indicates a required field for the import*

Note: *You do not need to import values for each of these fields. VersaTrans TripTracker will populate just the fields that you define in your import.*

Trip Locations

Table 10.

Screen Name
*Location Name
Status *(Values = Y/N)*
**Location Type

* *indicates a required field for the import*

Note: *You do not need to import values for each of these fields. VersaTrans TripTracker will populate just the fields that you define in your import.*

Accounts

Screen Name
*Name
Building ID
Budget Number
Address1
Addres 2
City
State
Zip
Budget Threshold
Charge Basis
Approval Path
Account Instructions
Status
External Account

** indicates a required field for the import*

Note: *You do not need to import values for each of these fields. VersaTrans TripTracker will populate just the fields that you define in your import.*

Account Contacts/Requesters/Drivers

Screen Name
*Account Name
Employee Number
**Is Contact
**Is Requester
**Is Driver

** Indicates a required field for the import*

*** At least one of these fields needs to be "Y" for an import to take place*

Note: *You do not need to import values for each of these fields. VersaTrans TripTracker will populate just the fields that you define in your import.*

Batch Creation of Users

Batch User Creation allows you to quickly generate user accounts for a large number of employees. The Batch User Creation process enables you to filter on a specified set of employees and then select the appropriate account(s) to which those employees should be assigned.

Because you may not always be able to use the Employee filter criteria to get the exact list of employees that you want to be part of the same User Group, there is a recommended work flow to help facilitate the creation of Users and their assignment to specific User Groups.

This section will walk you through importing a list of employees with similar characteristics by assigning them all the same Employee Type. From there, on the Batch User Creation page you can filter for this specific Employee Type and then assign all of those employees to the same User Group and Accounts.

The steps that need to be taken for the Batch Creation of Users include:

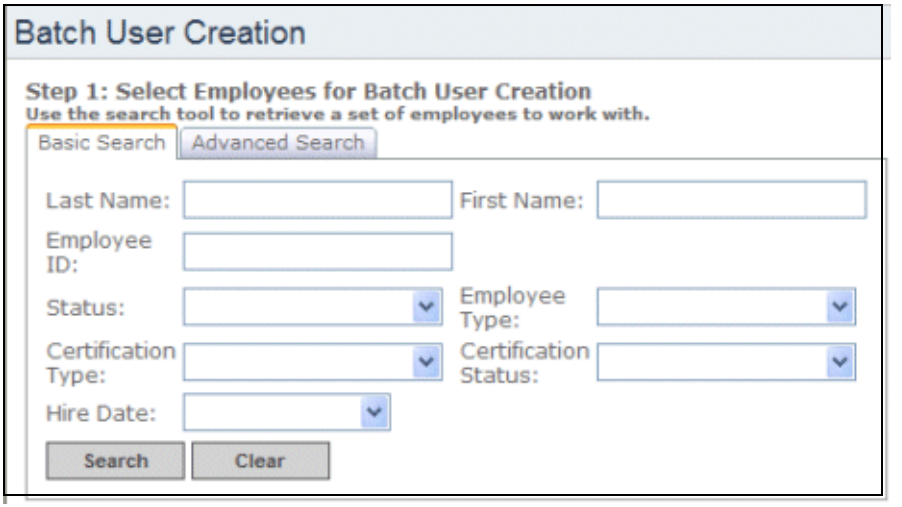
1. Add Accounts, See, *Adding Account Records* on page 64.
2. Setup the "specific" Employee Type that you want to associate the designated employees with. This will allow you to import employees using the specified employee type (step 4) and filter on the employee type that the imported employees belong to (step 5). See, *Adding an Employee Type and Associating Certifications* on page 122.
3. Add User Groups. See, *Adding a User Group* on page 237.
4. Import Employees using the specified Employee Type. Setup your employee import so that employees that will be Users have the specific employee type that matches the employee type that you created in step 2. See, *Using the Import Utility* on page 267.
5. Filter on the Employee Type that the imported Employees (step 4) belong to. Once you have your list of employees, select the username and password format along with the User Group and Account(s) which these users should have access to. See, *Batch Assigning Employees to a User Group & Accounts* on page 288.

Batch Assigning Employees to a User Group & Accounts

To batch assign employees to a user group & accounts:

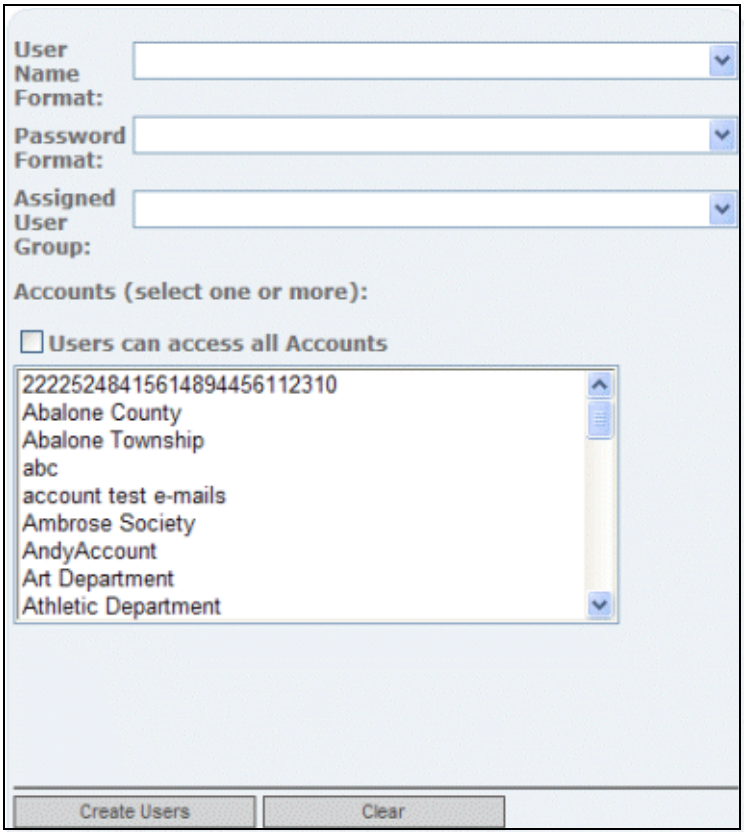
Path:) **Admin > Batch User Creation**

1. Follow the above path to display the Batch User Creation page. This page consist of two panels. The panel on the left allows you to perform an employee search. The panel on the right allows you to select import options.
2. You start by performing either a basic or advanced search to find the employee records that you want to batch assign.



For information on how to use the basic and advanced search, see *Finding & Editing an Employee's Record* on page 150. Once the search is performed, the results must be used in their entirety and individual employees cannot be selected.

Once you have finished selecting employees for batch user creation, you will select import options in the "Select Import Options" panel on the right side of the page.

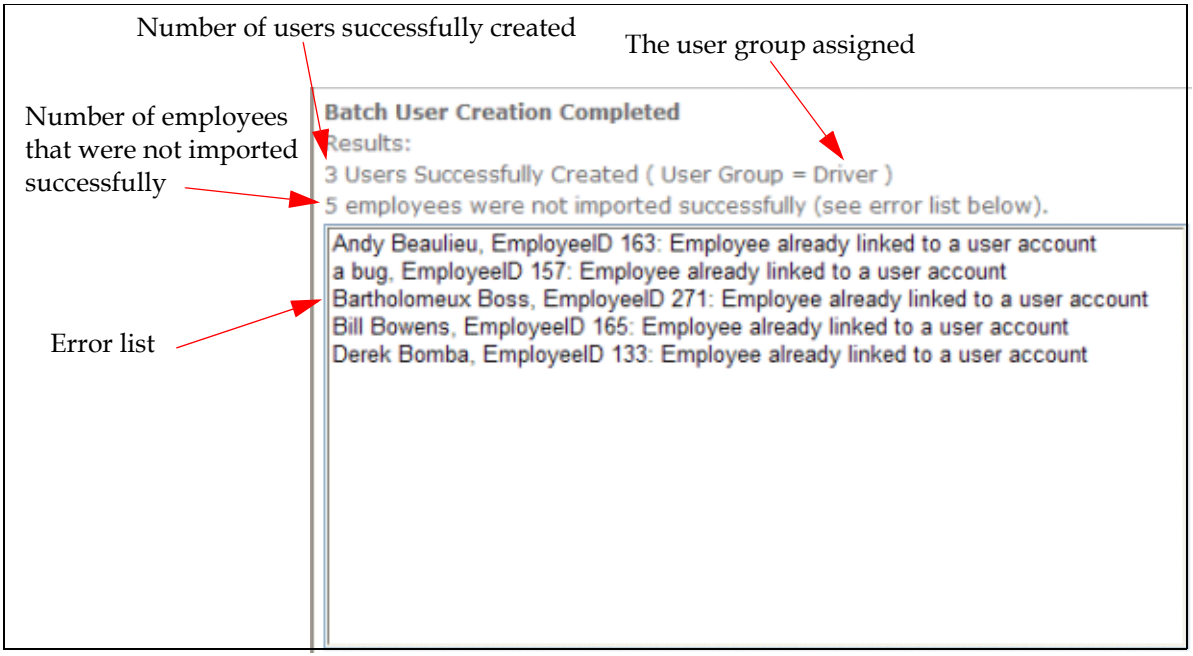


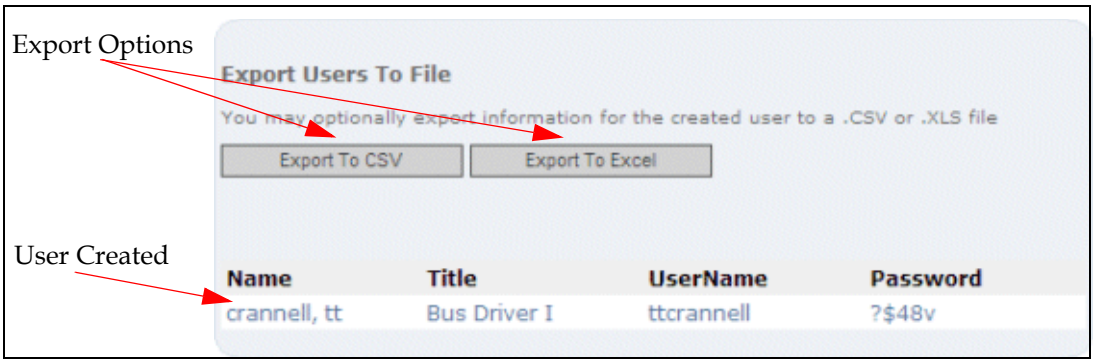
3. Select a User Name Format and Password Format.

   If you use select the "Generate Random Password" option for the password format, the passwords generated will adhere to the "Min special characters in password" and "Min characters in password" settings as specified in the VersaTrans TripTracker Configuration Utility via the Login tab.

If you use the "User ID" option only employees with User ID's that adhere to the "Min special characters in password" and "Min characters in password" will be assigned to User Groups and Accounts.

4. Select the User Group that you want the employee(s) assigned to.
5. To select a specific account, click on that account. Use the Ctrl and Shift keys to select multiple accounts.
6. Check the "Users can access all accounts" box to select all the accounts.
7. Click Create Users to assign the employees to a user group & accounts. The "Batch User Creation Completed" screen displays containing the batch creation results and export options as shown below.


Number of users successfully created
The user group assigned
Number of employees that were not imported successfully
Error list
Batch User Creation Completed
Results:
3 Users Successfully Created (User Group = Driver)
5 employees were not imported successfully (see error list below).
Andy Beaulieu, EmployeeID 163: Employee already linked to a user account
a bug, EmployeeID 157: Employee already linked to a user account
Bartholomeux Boss, EmployeeID 271: Employee already linked to a user account
Bill Bowens, EmployeeID 165: Employee already linked to a user account
Derek Bomba, EmployeeID 133: Employee already linked to a user account



8. You can export the information for the user(s) that were created as a CSV or Excel file. If you want to export this information, click Export To CSV or Export To Excel and then click Save

   Note: *You also have the option of opening the CSV file in an Excel spreadsheet.*

9. Select the location where you want to export the file and enter a name for the file.

10. Click Save.

Using the Batch User Creation Log

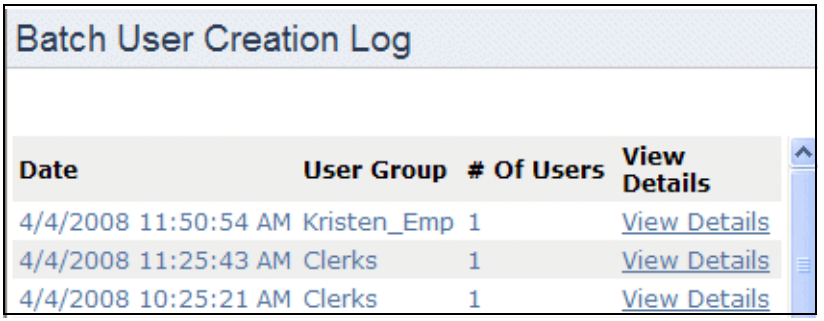
The "Batch User Creation Log" allows you to display a chronological list of users that were successfully created. You can then make a selection from the list and view the details (Name, Title, UserName and Password) of those users.

To use the batch user creation log:

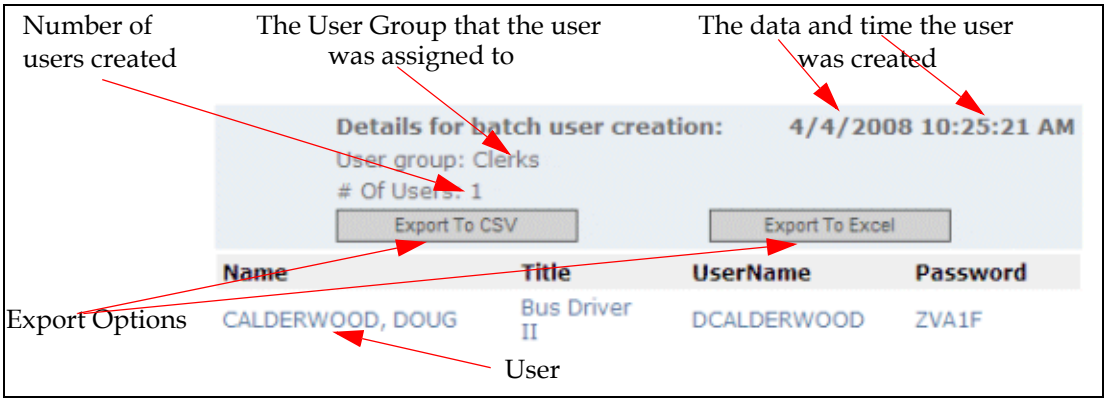
Path:) **Admin > Batch User Creation**

1. Follow the above path to display the Batch User Creation page.

2. Click Batch User Log to display the Batch User Creation Log. This log provides a chronological list of successfully created users.


Batch User Creation Log
Date
User Group
Of Users
View Details
4/4/2008 11:50:54 AM Kristen_Emp 1 View Details
4/4/2008 11:25:43 AM Clerks 1 View Details
4/4/2008 10:25:21 AM Clerks 1 View Details

3. Make a selection from the list and click View Details . to view associated User information.



4. You can export the information for the user(s) that were created as a CSV or Excel file. If you want to export this information, click Export To CSV or Export To Excel and then click Save

Note: *You also have the option of opening the CSV file in an Excel spreadsheet.*

5. Select the location where you want to export the file and enter a name for the file.
6. Click

.

Appendix C

Installation, Conversion & Integration

Topics In This Appendix:

What are the VersaTrans TripTracker Components & How to Install Them?, 296

Loading the VersaTrans TripTracker Sample & Blank Databases, 320

Opening VersaTrans TripTracker & Registering the Application, 324

Converting VersaTrans TripTracker 1.2 Data, 326

VersaTrans RP/TripTracker & VersaTrans FleetVision Integration, 333

What are the VersaTrans TripTracker Components & How to Install Them?

Welcome to Tyler's VersaTrans TripTracker. Only system administrators familiar with the complexities of working with web servers and with your organization's operating environment(s) should install VersaTrans TripTracker. We provide the instructions necessary for adding VersaTrans TripTracker and some advice for integrating our product into your architecture.

You will need to perform the following tasks to install and run VersaTrans TripTracker:

- Install Microsoft Internet Information Services (IIS)
- Install .NET Framework runtime (Application & Web Server)
- Install ASP.NET AJAX Library
- Install Microsoft Report Viewer Setup (Application Server)
- Install VersaTrans Trip Tracker
- Install VersaTrans TripTracker Sample Data (Database Server)
- Generate Security Tables for VersaTrans TripTracker

Important: ***If you are currently a VersaTrans RP user, it is important to note that VersaTrans TripTracker uses the same database as VersaTrans RP.***

Installing Microsoft Internet Information Services (IIS)

Before beginning the Microsoft Internet Information Services (IIS) installation, you will need to have IIS installed on the machine where you are installing VersaTrans TripTracker. If you do not have IIS installed, you can install IIS from the Windows Installation CD.

To install Microsoft Internet Information Services (IIS):

Path:) **Start > Control Panel**

1. Click ADD OR REMOVE PROGRAMS.
2. Click **ADD OR REMOVE WINDOWS COMPONENTS** in the left panel of the window. The Window Component Wizard dialog displays.
3. Click on the **Application Server** entry and click the **DETAILS** button. The Application Server dialog displays.
4. In the Application Server dialog, click on **Internet Information Services (IIS)** and click the **DETAILS** button.
5. Select **World Wide Web Service** and click **OK.**
6. Click **OK** in the Application Server dialog box.
7. Click **NEXT** in the Windows Components dialog box.
8. Click **FINISH** in the Completing the Windows Components Wizard.

Downloading the VersaTrans TripTracker Installation Files or Using a CD

The VersaTrans TripTracker installation files can be downloaded from the VersaTrans Solutions Support website, or you can purchase and use the VersaTrans TripTracker installation CD by calling VersaTrans Solutions @ 800-775-5556.

Downloading the VersaTrans TripTracker Installation Files

1. Go to the VersaTrans Web site at http://www.versatrans.com/support/support_offerings.cfm.
2. Click on the "Go to VersaTrans Knowledgebase" link.

3. Enter your Username and Password which can be found in the "Instructions for Electronic Download of VersaTrans Products" that was provided when the software was purchased. If you cannot find this information, contact VersaTrans Technical Support @ 800.775.5556.
4. Select **VersaTrans TripTracker** from the VersaTrans Support Knowledgebase menu.

   Note: *At the time of installation, you will use the Registration Name and Registraton Code to register your product(s).*

5. Use the keyword search "installation files" to locate the appropriate page for downloading the installation files.
6. Select **Versatrans TripTracker Installation Files** and download the installation files according to the instructions that appear on the screen.
7. Once you have downloaded the VersaTrans TripTrackern installation files from our website, go to the location where you downloaded the product (the default is C:\TripTracker Installation Files.)
8. Double-click on the launcher.exe to bring up the VersaTrans TripTracker Install Menu.

You are now ready to install the individual components that comprise VersaTrans TripTracker. For detailed instructions on how to install each component, see *Installing the VersaTrans TripTracker Components* on page 299.

Using the VersaTrans TripTracker Installation CD

1. Insert the installation CD into the CD-ROM and go to Start > My Computer and double-click on your CD Drive to display the available folders.
2. Double-click on the launcher.exe to bring up the VersaTrans TripTracker Install Menu.

You are now ready to install the individual components that comprise VersaTrans TripTracker. For detailed instructions on how to install each component, see *Installing the VersaTrans TripTracker Components* on page 299.

Installing the VersaTrans TripTracker Components

You are now ready to install the individual components that comprise VersaTrans TripTracker. For detailed instructions on how to install each component, proceed to the following topics:

- *Installing VersaTrans TripTracker on page 308Installing .NET Framework 2.0* on page 299
- *Installing the ASP .Net AJAX Library* on page 301
- *Installing the Microsoft Report Viewer* on page 303
- *Installing SQL Server Express 2005* on page 304
- *Installing and Starting the VersaTrans Server Agent* on page 307
- *Installing VersaTrans TripTracker* on page 308Installing .NET Framework 2.0

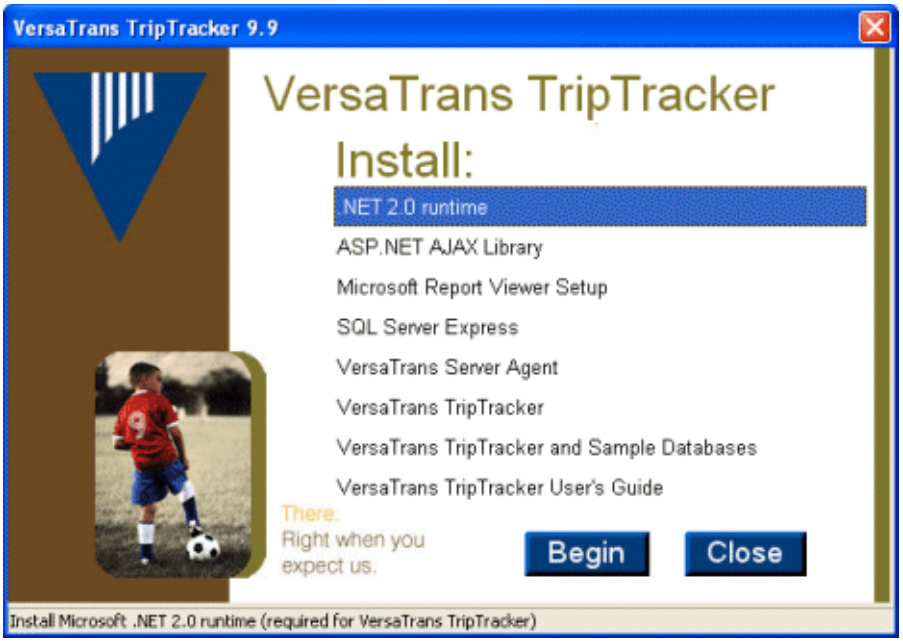
.NET Framework 2.0 is an environment for building, deploying, and running Web Services and other applications. It includes many technologies that are designed to facilitate rapid development of Internet and intranet applications.

Before beginning the VersaTrans TripTracker installation, you will need to have .NET Framework installed and enabled on your system. You cannot run VersaTrans TripTracker without having .NET Framework installed or enabled.

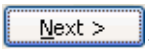
Note: *Windows Installer 3.0 or later is a prerequisite for .NET 2.0 installation. Version 3.1 can be found on the TripTracker Installation CD.*

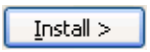
To install .NET Framework:

1. From the VersaTrans TripTracker "Install" menu, select **.NET 2.0 runtime**.



2. Click

. The Microsoft .NET Framework 2.0 Setup dialog displays.
3. Click 

. The License Agreement dialog displays.
4. Read the license agreement. If you want to continue with the install process, click ***I accept the terms of the License Agreement*** and then click 

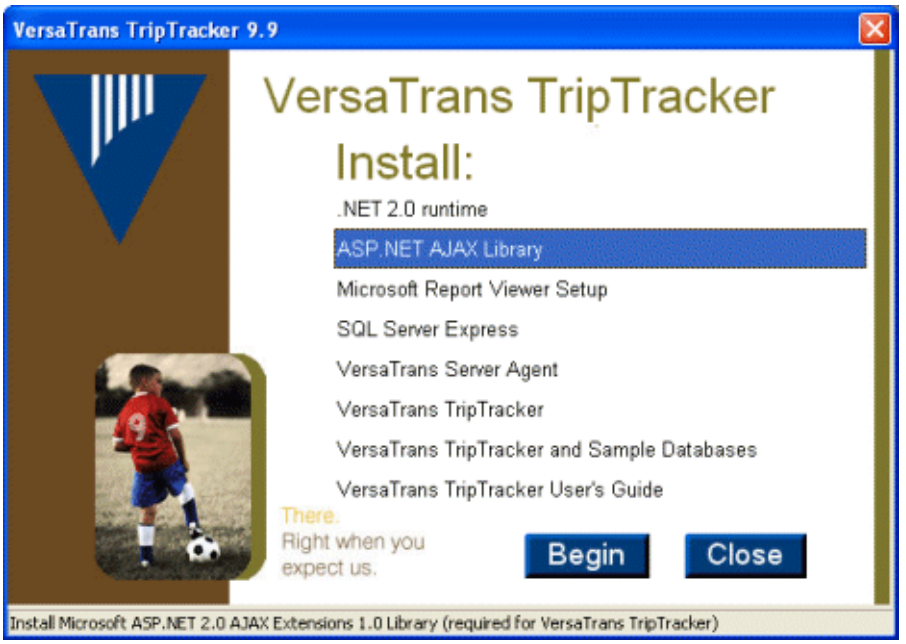
.

5. When the installation is complete, click Finish to complete the installation and close the dialog.

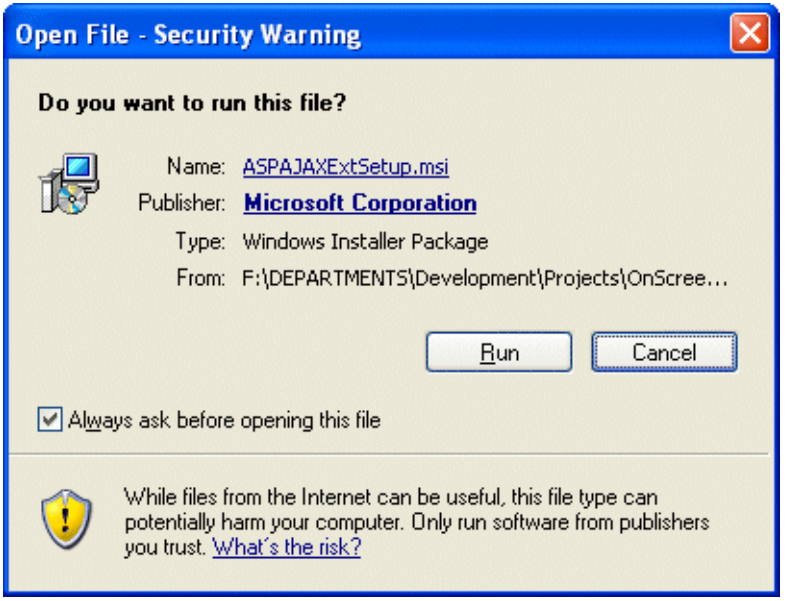
Installing the ASP .Net AJAX Library

The ASP .Net AJAX Library provides AJAX functionality. These assemblies are required for VersTrans TripTracker.

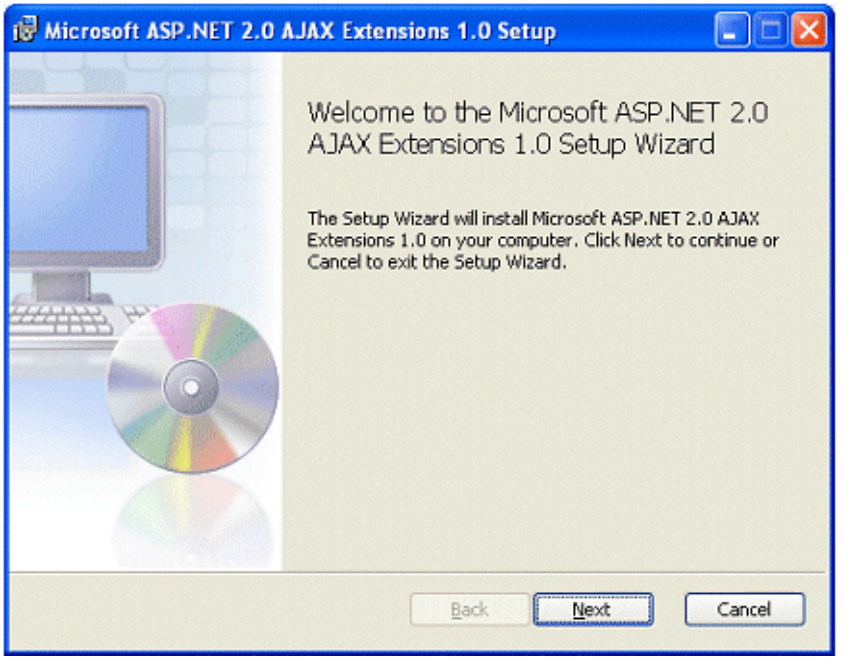
1. From the VersaTrans TripTracker "Install" menu, select **ASP .NET AJAX Library**.



2. Click Begin. A Security Warning displays.


Open File - Security Warning
Do you want to run this file?
Name: ASPAJAXExtSetup.msi
Publisher: Microsoft Corporation
Type: Windows Installer Package
From: F:\DEPARTMENTS\Development\Projects\OnScree...
Run
Cancel
Always ask before opening this file
While files from the Internet can be useful, this file type can potentially harm your computer. Only run software from publishers you trust. What's the risk?

3. Click Run. The Microsoft ASP.NET 2.0 AJAX Extensions 1.0 Setup Wizard displays.

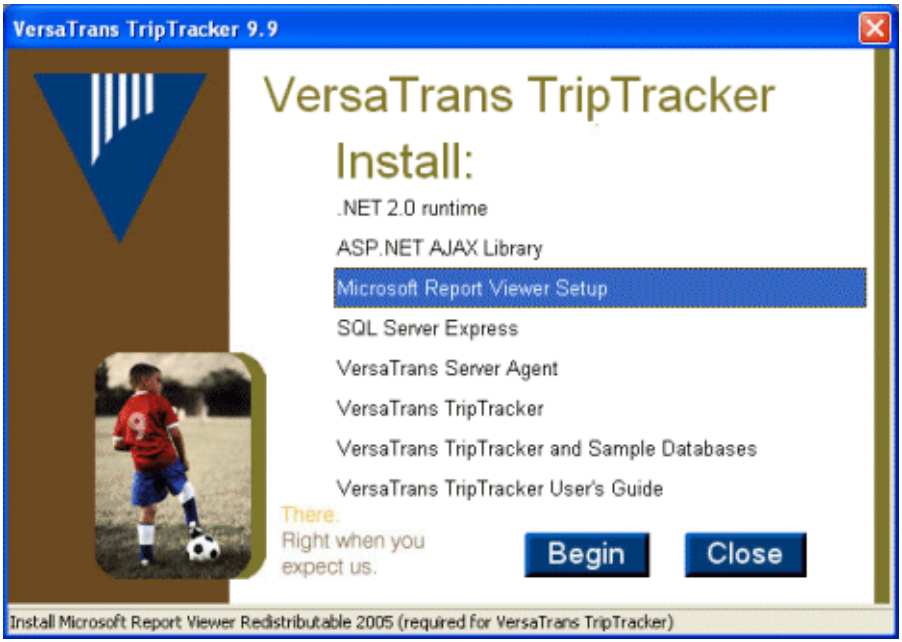

Microsoft ASP.NET 2.0 AJAX Extensions 1.0 Setup
Welcome to the Microsoft ASP.NET 2.0 AJAX Extensions 1.0 Setup Wizard
The Setup Wizard will install Microsoft ASP.NET 2.0 AJAX Extensions 1.0 on your computer. Click Next to continue or Cancel to exit the Setup Wizard.
Back
Next
Cancel

4. Click Next >. The License Agreement dialog displays.
5. Read the license agreement. If you want to continue with the install process, click ***I accept the terms of the License Agreement*** and then click Next >.
6. Click Install > to start the installation.
7. When the install is complete, click Finish.

Installing the Microsoft Report Viewer

The Microsoft Report Viewer allows you to process and render reports.

1. From the VersaTrans TripTracker "Install" menu, select **Microsoft Report Viewer Setup**.



2. Click

.

   When the installation is complete a dialog displays indicating that the setup is complete.

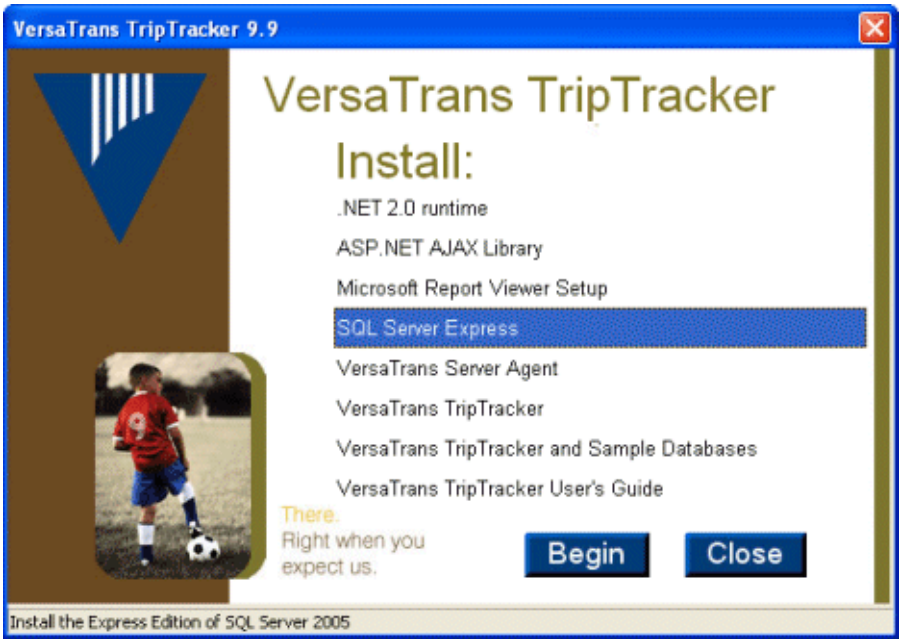
3. Click

to close the dialog.

Installing SQL Server Express 2005

SQL Server 2005 Express Edition is a lightweight, and embeddable version of SQL Server 2005.

1. From the VersaTrans TripTracker "Install" menu, select **SQL Server Express**.

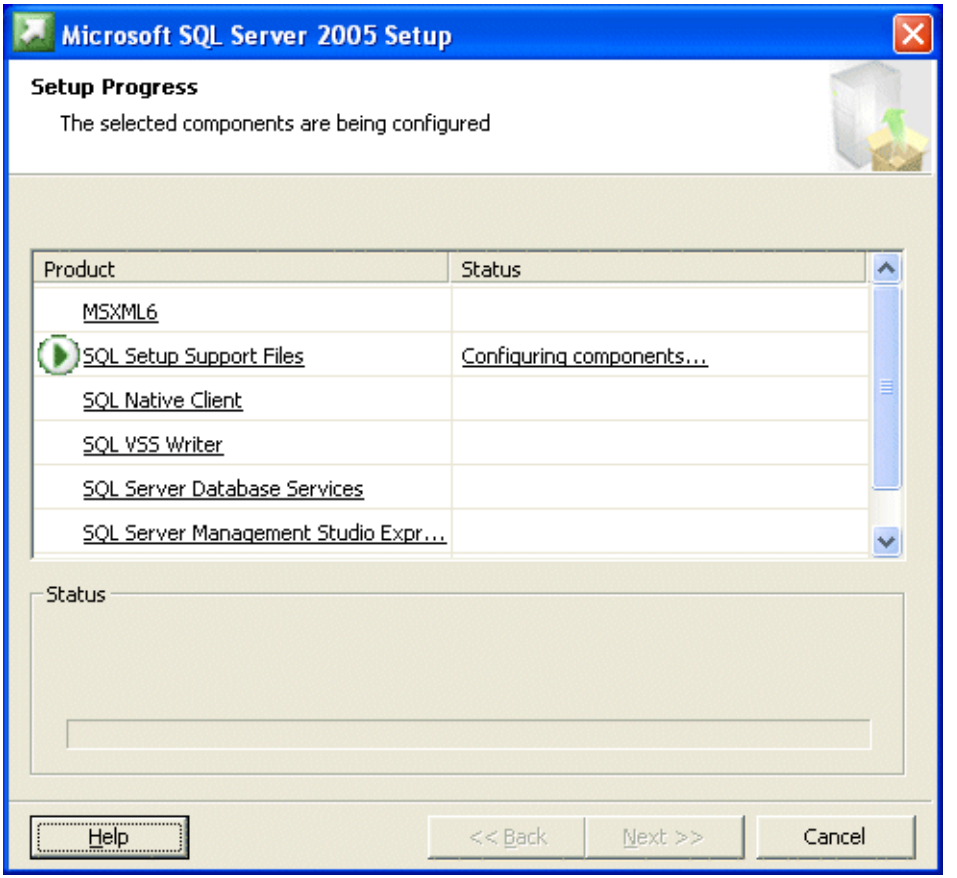


2. Click **BEGIN** to launch the set up program.

3. Click **NEXT** and by default SQL Server Express will be installed in: C:\Program files\Microsoft SQL Server. You have the option of specifying a different directory by clicking **BROWSE** and navigating to the desired directory.

   Note: *This installation requires that other Microsoft components have already been installed. Should you be prompted to install these components, they can be found and installed from the CD or by accessing the Microsoft Support website.*

The Microsoft SQL Server 2005 Setup dialog displays, showing the progress of the components being installed, removed, etc.



4. Once SQL Server Express has been installed successfully, the dialog will close automatically.

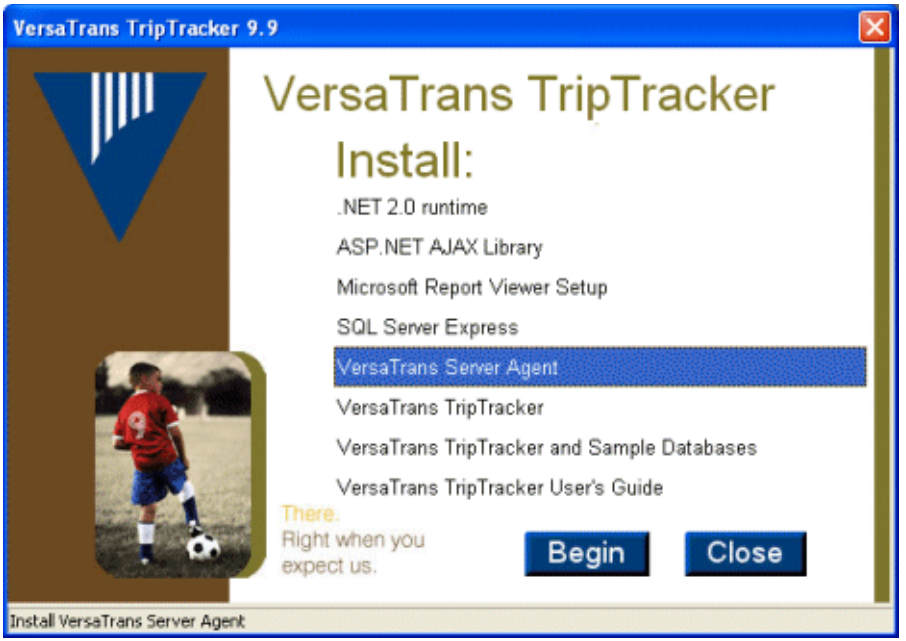
   Note: *This installation sets the SA password to vtrans and default authentication mode to mixed (NT authentication & SQL authentication).*

Installing and Starting the VersaTrans Server Agent

The VersaTrans Server Agent allows you to make a backup of the current database that you are working in without specifying the database location path. Installation is required when using SQL Server 2005 which has no backup capability without the VersaTrans Server Agent.

> ***Note:*** *The Server Agent needs to be installed on the same machine as SQL Server.*

1. From the VersaTrans TripTracker "Install" menu, select **VersaTrans Server Agent**.



2. Click **BEGIN** to launch the installation program. The VersaTrans Server Agent Installation Wizard displays.
3. Complete the suggested recommendations and click **NEXT**.

4. Select a folder where the application will be installed. The default location is C:\Programs\VersaTrans Suite\Common\ or you can browse for a different location. Click **NEXT**.

5. Click **NEXT** to begin the installation. When the installation is complete, click **FINISH** to close the dialog.

   The VersaTrans Server Agent will start automatically. You can start and stop the Server Agent within Administrative Tools > Services on the server where it was installed.

Installing VersaTrans TripTracker

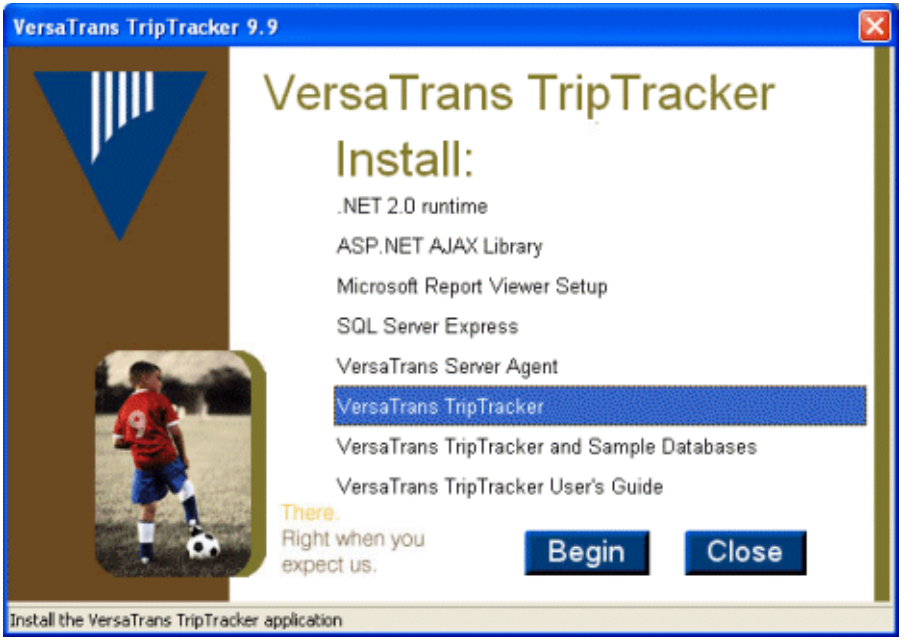
VersaTrans TripTracker employs a Graphical User Interface (GUI). This graphical user interface when deployed over the World Wide Web presents information in a user-friendly way using pictures, graphics and icons.

This installation will install the following three components when selecting the recommended install.

- VersaTrans TripTracker Web application
- VersaTrans TripTracker Conversion Utility
- VersaTrans TripTracker Database Console

To install VersaTrans TripTracker:

1. From the VersaTrans TripTracker "Install" menu, select **VersaTrans TripTracker**.

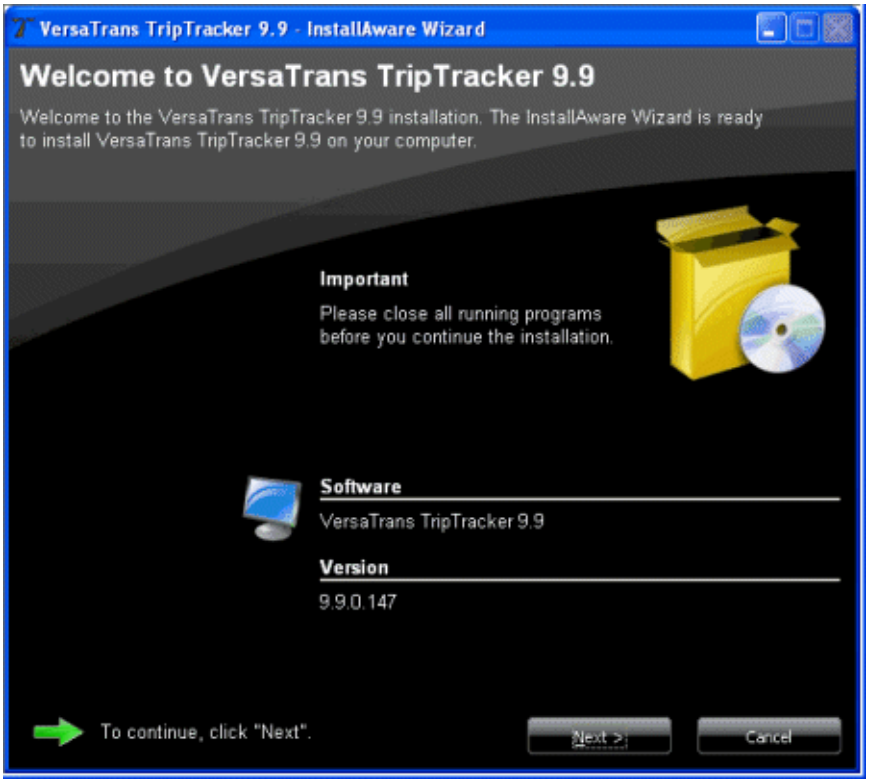


2. Click

. You will see the following message while the installation program is loading.

InstallAware Wizard
The InstallAware Wizard is verifying the contents of this setup package. This may take a moment.
Cancel

When the installation program has finished loading, the VersaTrans TripTracker Installation Wizard Welcome screen displays.


VersaTrans TripTracker 9.9 - InstallAware Wizard
Welcome to VersaTrans TripTracker 9.9
Welcome to the VersaTrans TripTracker 9.9 installation. The InstallAware Wizard is ready to install VersaTrans TripTracker 9.9 on your computer.
Important
Please close all running programs before you continue the installation.
Software
VersaTrans TripTracker 9.9
Version
9.9.0.147
To continue, click "Next".
Next >
Cancel

3. Click Next >. The Customer Registration dialog displays.
4. Enter your information and click Next >. The Type of Installation dialog displays.

   The installation defaults to Recommended Installation - Complete Install. If you select Custom Install (for advanced users), you can select whether you want to install the web application, database console, or conversion utility.
5. Click Next >. The Destination Folder dialog displays.

This is where the VersaTrans Console for SQL Server and the TripTracker Conversion Utility will be installed. The database console will install to a sub-directory called "common". The conversion utility will install to a sub-directory called "TripTracker".

6. Select your directory and click

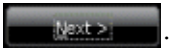
. The New Virtual Directory dialog displays.

   The virtual directory name defaults to "TripTracker". The default location for this directory is C:\Inetpub\wwwroot\triptracker.

7. Click

. The Shortcuts dialog displays.

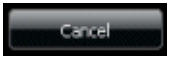
8. Specify where you would like the shortcuts for VersaTrans TripTracker. The default is the VersaTrans Suite program group. This will allow the Database Console for SQL Server and the Conversion Utility to be accessed from the Start menu.

9. Click 

. The Ready to Install dialog displays.

10. Close all running programs and click

. The Installing TripTracker dialog displays.

    Wait for the installation to complete or click 

to abort the install.

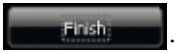
11. When the installation completes, the installation Results dialog displays.

12. If you already have VersaTrans RP installed, you are ready to run the VersaTrans TripTracker Conversion Utility and can check **RUN VERSATRANS TRIPTRACKER CONFIGURATION UTILITY NOW.**

Important: ***If you are currently a VersaTrans RP user, it is important to note that VersaTrans TripTracker uses the same database as VersaTrans RP.***

OR,

If you only have VersaTrans TripTracker, do not check the box **RUN THE VERSATRANS TRIPTRACKER CONFIGURATION UTILITY NOW**. You can run the conversion utility after you have restored the blank VersaTrans TripTracker database (see, *Loading the VersaTrans TripTracker Sample & Blank Databases* on page 320).

13. Click 

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Using the VersaTrans TripTracker Configuration Utility

Once you have installed VersaTrans TripTracker, you will need to use the VersaTrans TripTracker Configuration Utility to specify how you will connect to your data. If you already have VersaTrans RP installed, you are ready to configure your VersaTrans TripTracker settings.

If you only have VersaTrans TripTracker, skip this step and run the VersaTrans TripTracker Conversion Utility after you have restored the blank VersaTrans TripTracker database (see, *Loading the VersaTrans TripTracker Sample & Blank Databases* on page 320).

To access the VersaTrans TripTracker Configuration Utility:

Path:) Start > Program Files > VersaTrans Suite > TripTracker > VersaTrans TripTracker Confutation Utility

1. Follow the above path to display the TripTracker Configuration dialog.

The VersaTrans TripTracker Configuration Utility can only be run on the machine where the VersaTrans TripTracker web application was installed. The configuration utility displays where the web.config is located.

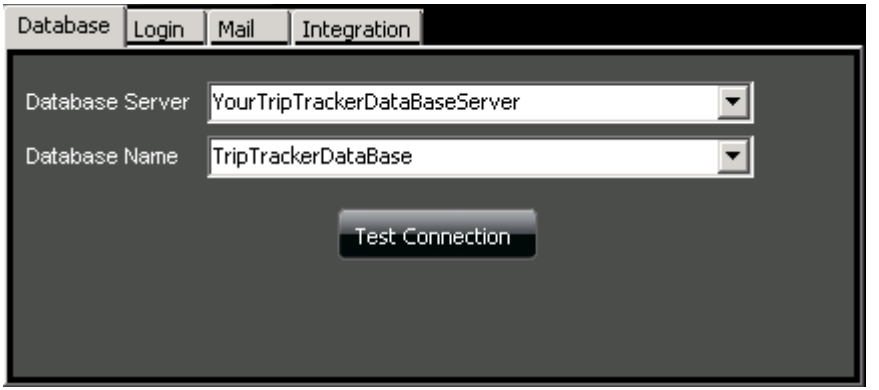
There are 4 tabs for the settings which can be altered:

- Database
- Login
- Mail
- Integration

On any of these tabs, you may perform the following actions:

- **Reset** – the reset button will reload the web.config file, replacing any changes that the user made that have not been saved.
- **Save** – the save button will save the changes made to the web.config file using the file name specified on this page.
- **Close** – the close button will close the VersaTrans TripTracker Configuration Utility.

Database Tab



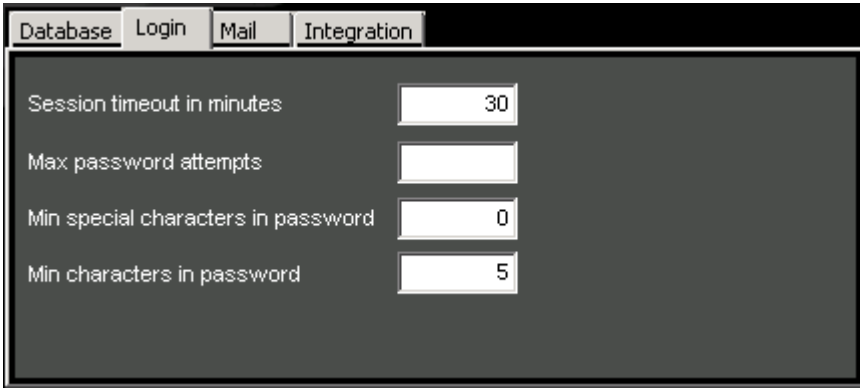
Database Server
Enter the name of the server where your VersaTrans RP/TripTracker data resides or use the pull-down list to select it.

Database Name
Enter the name of the VersaTrans RP/TripTracker database or use the pull-down list to select it.

- Click on

to verify that the settings are valid.

Login Tab



Session timeout in minutes
Enter the number of minutes it takes for an inactive user to be timed out of the system. The default is 30 minutes.

Max password attempts
Sets the number of invalid password or password-answer attempts allowed before the membership user is locked out. The default here is blank.

Min special characters in password
Sets the minimum number of special characters that must be present in a valid password. The default here is zero.

Min characters in password
Gets the minimum length required for a password. The default is 5.

Mail Tab

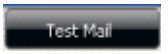
The mail settings define the SMTP settings needed for VersaTrans TripTracker to send email as part of the trip process.

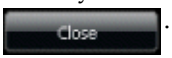
Mail server
Specify the name of your mail server.

Mail server login
Specify the login needed for the mail server.

Mail server password
specify the password for the mail server login

Send as address
Specify the address that you wish to indicate that the VersaTrans TripTracker messages are being sent from.

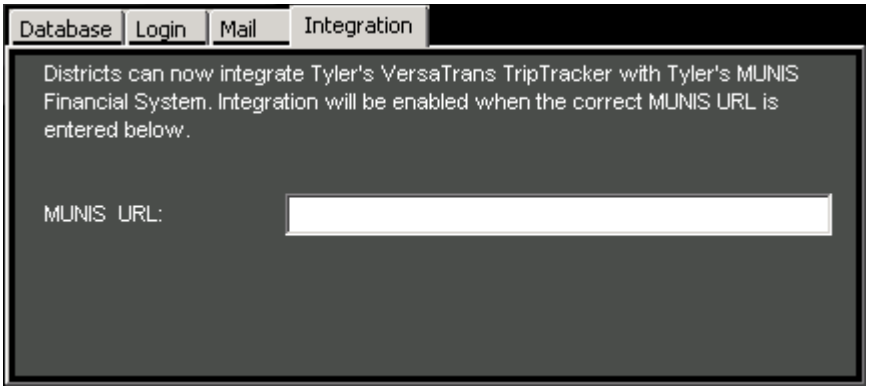
1. You can click 

to verify that the settings are valid.
2. When you are finished entering configuration settings, click 

.
   - Configuration Utility.

Integration Tab

Districts can now integrate Tyler's VersaTrans TripTracker with Tyler's MUNIS Financial System. Integration will be enabled when the correct MUNIS URL is entered.


Database
Login
Mail
Integration
Districts can now integrate Tyler's VersaTrans TripTracker with Tyler's MUNIS Financial System. Integration will be enabled when the correct MUNIS URL is entered below.
MUNIS URL:

MUNIS URL
Integration between VersaTrans TripTracker and MUNIS is active when a valid MUNIS URL displays in the MUNIS URL field. If the MUNIS URL is blank, the user needs to contact the MUNIS system administrator and obtain a valid URL.

Setting Write Permissions for Reports

During the VersaTrans TripTracker installation routine, "read" and "write" permissions were placed at the "\inetpub\wwwroot\triptracker' level (and inherited by all subdirectories beneath it) for the following users:

- ASPNET – for Windows Server 2000 and Windows XP
- Network Service – for Windows Server 2003, Windows XP, and Vista

The reason for this is because when you generate reports in VersaTrans TripTracker, the files generated (both .pdf and .xls) need to be written to a

subdirectory on the web server. For imports, files are temporarily stored in a subdirectory on the web server. Failure to have this permission set will result in errors when attempting to generate reports or import files into VersaTrans Trip Tracker.

If you use an account other than ASPNET or Network Services to access your web applications, you will need to set the "write" permissions for that account on the directories noted below.

- \inetpub\wwwroot\triptracker\customreports
- \inetpub\wwwroot\triptracker\customsubreports
- \inetpub\wwwroot\triptracker\importfiles
- \inetpub\wwwroot\triptracker\images

Loading the VersaTrans TripTracker Sample & Blank Databases

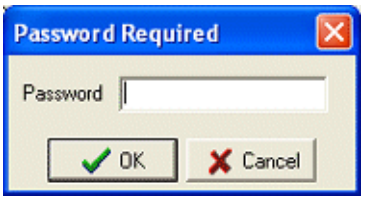
Note: *The sample database can only be used with SQL Server Express/SQL Server 2005. It is not compatible with SQL Server 2000.*

VersaTrans TripTracker provides you with two different databases, a sample database and a blank database. To get you started quickly, we have put together a sample set of records for your TripTracker database (TTSample.zip). The sample data allows you to get familiar with VersaTrans TripTracker before you begin working on your own district's records.

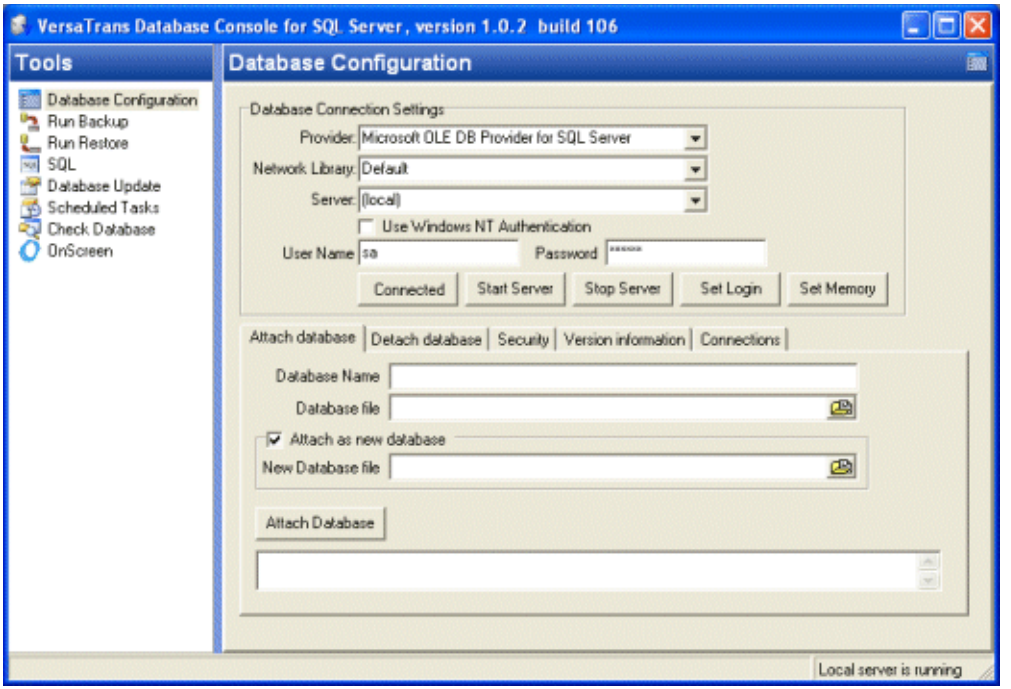
When you are ready to use VersaTrans TripTracker with your own data, you will attach the blank database (TTData.zip) to VersaTrans TripTracker and import your current data into the blank database.

The procedures for loading the sample (TTSample.zip) and blank database (TTData.zip) are identical.

1. Click Start > Programs > VersaTrans Suite **>** Common **>** VersaTrans Database Console for SQL Server to start the utility. A password prompt displays.



2. Type vtrans in the password field and click **OK**. The VersaTrans Database Console for SQL Server displays as in the next figure.



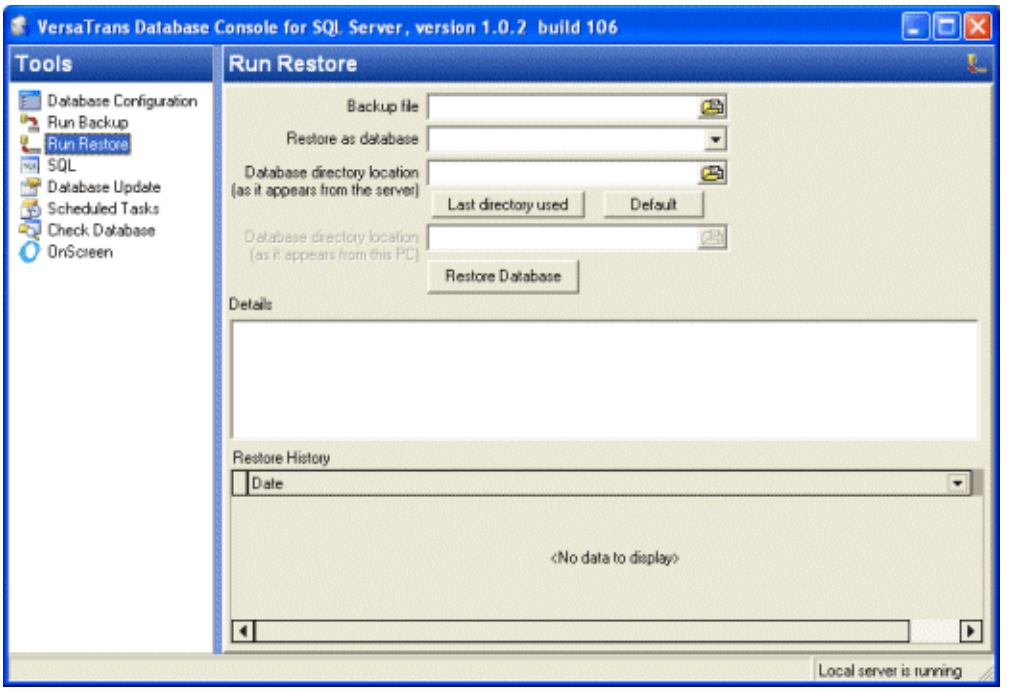
3. Enter the SQL Server name/computer name followed by \sqlexpress. For example: TransportationServer\sqlexpress.

4. Enter your User Name and Password.Your User Name is *sa* and your Password is *vtrans*.

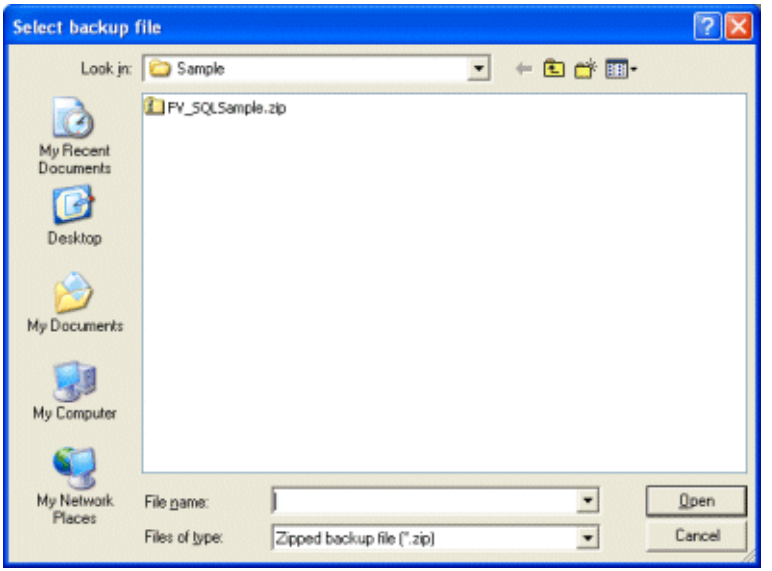
   If you have installed SQL Server prior to the VersaTrans TripTracker installation, you will need to obtain your Password and User information from your system administrator.

5. Click the **CONNECT** button to connect to the server. Now you are ready to restore a new database.

6. Click Run Restore from the Shortcut bar to display the Run Restore dialog.



7. Click the Backup file browse button to display the Set backup file dialog.



8. Browse the directory ~\TTData and select TTData.zip for the VersaTrans TripTracker blank database or TTSample.zip for the VersaTrans TripTracker sample database.

9. Type in a name for your new VersaTrans TripTracker database (i.e. Sample Data) in the Restore as database field.

10. The Database directory location *which should be filled in automatically* is the path where your VersaTrans database will be stored. In the event that it is not filled in browse to your SQL Server data directory.

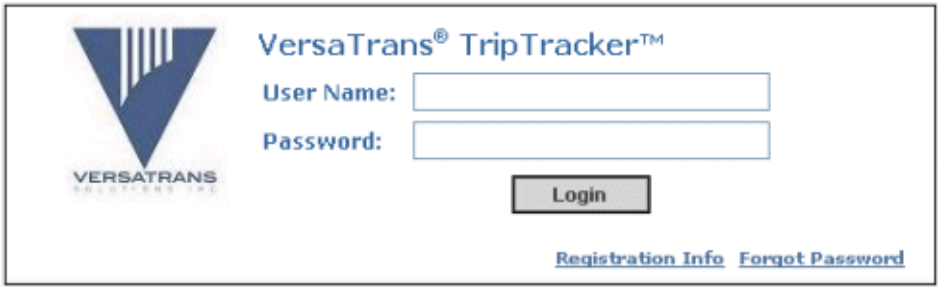
11. Click **RESTORE** to begin the process.

Now you are ready to open VersaTrans TripTracker for the first time. See, *Opening VersaTrans TripTracker & Registering the Application* on page 324.

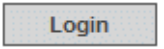
Opening VersaTrans TripTracker & Registering the Application

After installing VersaTrans TripTracker you will need to open your web browser and navigate to the VersaTrans TripTracker address. The TripTracker address will be "http://<VTTTserver>/<virtual directory>". For example, if you installed your VersaTrans TripTracker virtual directory (named "triptracker" by default) on a server named "Transportation", your VersaTrans TripTracker address would be "http://Transportation/triptracker".

1. Open your web browser and navigate to the VersaTrans TripTracker address. The VersaTrans TripTracker Registration dialog displays.
2. Enter your Company/Registration Name in the Registration Name field.
3. Enter your Registration Code. The code can be found with the VersaTrans TripTracker CD.
4. Click Register to display the VersaTrans TripTracker Logon screen.



5. Enter the Administrator User Name and Password provided by VersaTrans.

6. Click 

. The VersaTrans TripTracker Today screen displays. See, *Working In VersaTrans TripTracker Today* on page 17.

Converting VersaTrans TripTracker 1.2 Data

After you install the VersaTrans TripTracker upgrade and attach the blank database, you are ready to think about your data. If you are a current VersaTrans TripTracker 1.2 user, you can convert your existing data to the VersaTrans TripTracker format, which saves a lot of work.

> ***Note:*** *ONLY Version 1.2 users and later can convert their data using this utility. Users with older versions must upgrade before importing and users who have non-VersaTrans field trip tracking data cannot use this conversion utility at all.*

Overview of the Conversion Process

The conversion program takes your current data, converts it into a different format and imports it into the new database you have attached to VersaTrans TripTracker. How long the conversion takes depends upon the amount of information you have to convert. Original Version 1.2 data will remain available and unchanged because we use a copy of the data in creating the conversion. However, we highly recommend that you back up your data prior to the conversion.

> ***Note:*** *It is required that you run the VersaTrans TripTracker conversion utility from a workstation that currently has Version 1.2 installed.*

What Is Involved In Converting My Data

You will need to perform the following procedures to convert your data:

1. Install VersaTrans TripTracker as described in *Installing VersaTrans TripTracker* on page 308.

2. Connect to the empty database using the ToolMS, (See *Loading the VersaTrans TripTracker Sample & Blank Databases* on page 320).
3. Review your VersaTrans TripTracker 1.2 data to make it as complete as possible.
4. As a precaution, backup your VersaTrans TripTracker 1.2 data and place it in a separate directory.
5. If you have archived data that you want to convert, we recommend that you restore it after you backup your current data.
6. Open the VersaTrans TripTracker Conversion Utility and select the database you want to convert.
7. Specify the conversion options and convert your data.
8. Connect to the new database.

Preparing Your Version 1.2 Data

Before you convert your data, it makes sense to clean it up and remove any old information that you do not need in the new system.

- Delete any unneeded Accounts, Employees, Trips etc. keeping only those necessary to move ahead.

  Remember, the fewer the records, the faster and better the conversion. The more complete the records, the better report options you have.
- Review the Fiscal Period date ranges in version 1.2 and make sure there are no overlapping date ranges. This is important because those date ranges are what determines how trip charges are reported by Fiscal Period in version 9.9.
- Review your current trips. Note that any trips that are in a "scheduled" status, but do not have a driver associated with them will be converted to a trip with an "approved" status in the new version since it is required to have a driver associated with a scheduled trip.

Once you have pared down your data, "***back it up***". While the conversion shouldn't affect your current VersaTrans TripTracker 1.2 data files, it is a good idea to have a current back up before you begin.

What Information Cannot Be Converted

The following information cannot be converted:

- Custom Holidays
- Driver Pick Lists
- Message Templates
- Tip of the Day
- Option Settings
- Reports

- User Groups
- Users

Converting Your Data

Before we begin, we assume that you have already completed the VersaTrans TripTracker installation and have attached to the empty database, see *Installing VersaTrans TripTracker* on page 308. You must complete this entire process, including connecting to the blank database, to be ready to perform the conversion.

Further, we expect that you have cleaned up your data and backed it up one last time before beginning the conversion process.

Additional considerations:

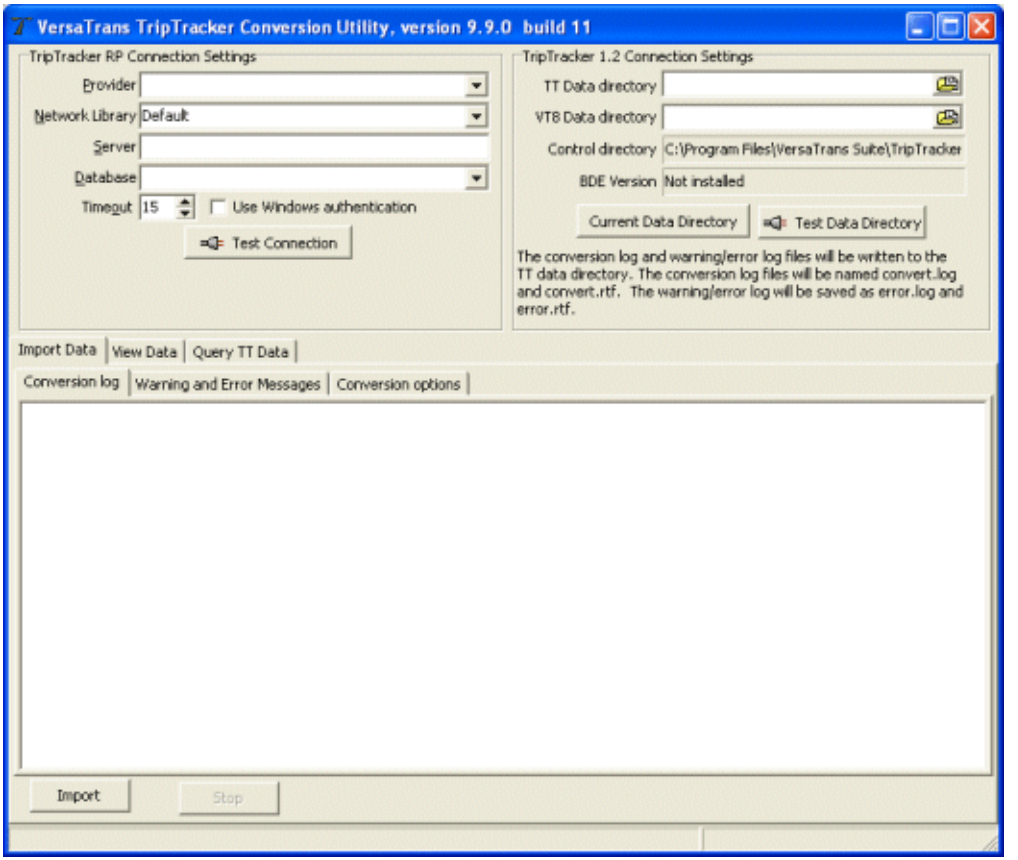
- Installation does not check for drive space please make sure you have adequate drive space.
- Make sure all users are out of VersaTrans TripTracker 1.2 and no one else is running VersaTrans TripTracker.

Converting Your 1.2 Data to VersaTrans TripTracker

To convert your 1.2 data to VersaTrans TripTracker:

Path:) Start > Programs > VersaTrans Suite > VersaTrans TripTracker >

VersaTrans TripTracker Conversion Utility



1. In the TT Data Directory field, click the button to display the list of directories on your local computer. Select the TT 1.2 data file path. If you do not know the data path, you can check by looking in your TT 1.2 options screen.

2. In the VT8 Data Directory field, click the button to display the list of directories on your local computer. Select the TT 1.2 data file path. If you do not know the data path, you can check by looking in your TT 1.2 options screen.

3. Click the Current Data Directory button to select the same data directory indicated in your TT 1.2 options.

4. Select the new database's settings in the VersaTrans TripTracker Connection Settings box.

   Provider
   Select the *Microsoft OLE DB Provider for SQL Server* from the Provider field.

   Network Library
   Select the network protocol you use to communicate to your database. Most users use *TCP/IP*.

   Server
   If you are connecting to the database over a network, type the name of the server you are using in this field. If your database is on your computer's hard drive, type (local) in this field. Make sure you enter the parentheses **( )** as well.

   Database
   Select the database from the drop-down list.

   Time Out
   This is the number of seconds you will allow the system to execute the import commands. If the import commands take longer than this, the system will end the command. We recommend that you leave the default entry as it is.

Use windows authentication
This option allows you to make your server more secure by only allowing specific windows logins to the server. When this checkbox is checked, VersaTrans attempts logging into the database server using the user's Windows NT authentication credentials.

5. Click the Import Data tab, and then click the Conversion options tab to display available conversion options:

    - Display TripTracker 1.2 record ID values during import
    - Delete TripTracker tables before importing
    - Display information about skipped records
    - Run the Pdxbld check and repair utility before importing - before you convert your 1.2 data to VersaTrans TripTracker, you should run the Pdxbld utility to check and repair the TripTracker 1.2 tables.

You are now ready to run VersaTrans TripTracker and connect to the new database.

Post Conversion Checklist

- Review the Warnings or Error Messages tab. .
- Remember that your security settings could not be converted and you must recreate those settings.
- For a TripTracker standalone installation, you need to run the TripTracker Configuratin Utility. See, *Using the VersaTrans TripTracker Configuration Utility* on page 312.

VersaTrans RP/TripTracker & VersaTrans FleetVision Integration

Note: *You must have VersaTrans RP in order for VersaTrans TripTracker data to be integrated with VersaTrans FleetVision. If you only have VersaTrans TripTracker and VersaTrans FleetVison, integrating between these two products is not supported.*

In order to initiate the integration between VersaTrans RP/TripTracker, and VersaTrans FleetVision, a one time integration matching process must be run. This process must be run when upgrading to Version 9.9 for existing users or when VersaTrans RP/TripTracker, or VersaTrans FleetVision has been purchased after having been populated with data.

VersaTrans RP/TripTracker allow for integration with VersaTrans Fleet Vision eliminating duplicate data entry in the following areas:

- Certifications
- Employees
- Vehicles

Anytime an add/change/delete action occurs on a record in VersaTrans RP/TripTracker, the record in VersaTrans FleetVision reflects the change immediately and vice versa.

Note: *If a record is open in both applications, the record will be editable to the user that opens the record first, any user that opens the record after the first user will receive a warning message and see the record as "read only."*

The following topics are covered in this section:

- *Setting Up the Database Connections, 334*
- *Matching Certification Records, 337*

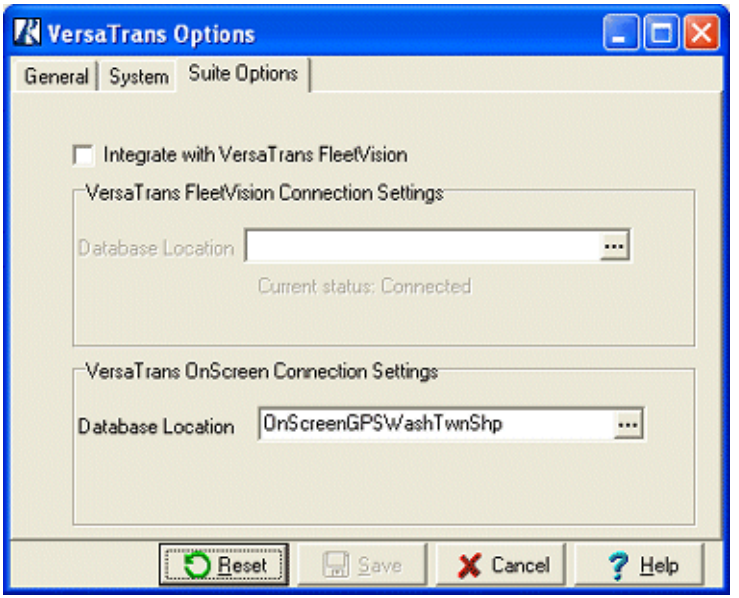
- *Matching Vehicle Records,* 341
- *Matching Employee Records,* 344

Setting Up the Database Connections

To integrate VersaTrans RP/TripTracker with VersaTrans FleetVision within the VersaTrans RP application, go to:

Path: Tools > Options > VersaTrans Options

1. Follow the above path to display the VersaTrans Options dialog.
2. Click the Suite Options tab to display the VersaTrans Options Integration dialog.



3. Click the **INTEGRATE WITH VERSATRANS FLEETVISION** checkbox. When this checkbox is checked, the VersaTrans FleetVision Connections Setting window is enabled.

4. Click ... to display the Database Connection Wizard.

   Note: *Since this is a system wide option, any other users logging into the VersaTrans RP/TripTracker databases will be connected to the same FleetVision database. Therefore, this setting can only be changed in single-user mode. If there is more than 1 user connected to the VersaTrans database, a warning dialog displays and you should not change the settings.*

Database Connection Wizard
Welcome to the Database Connection Wizard
Using this wizard you can define the database connection that will be used by VersaTrans.
Provider: Microsoft OLE DB Provider for SQL Server
Network Library: Default
Server: (local)
Database: Adams
Timeout: 10
Use Windows authentication
Test Connection
Save
Cancel

This dialog allows you to specify the FleetVision database connection information. Complete the selections and entries that are appropriate to your system.

Provider
Select Microsoft OLE DB Provider for SQL Server unless instructed by VersaTrans Solutions support staff otherwise.

Network Library
Select TCP/IP from this drop down unless instructed by VersaTrans Solutions support staff otherwise.

Server
Type (local) in this field.

Database
Select the database you attached to from this list.

Timeout
Leave this entry as it is. The amount of time the system will spend trying to connect to the database. If you type 30 in this field, VersaTrans will try for 30 seconds before timing out of the database.

5. When these entries and selections are complete, click **SAVE**. Saving these change applies the connection settings to the FleetVision database.

   Once the database is connected, a green label (Current Status: Connected) indicates that the connection to FleetVision has been successful.

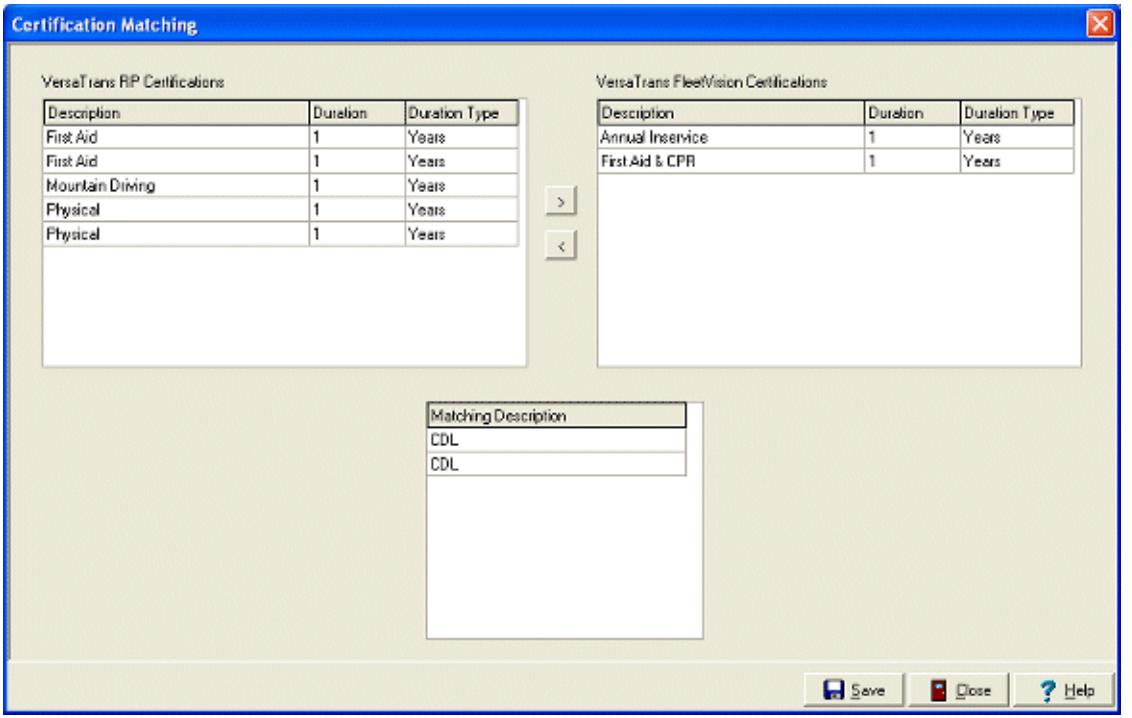
Matching Certification Records

Allows you to associate similar certifications in VersaTrans RP/TripTracker with similar certifications in VersaTrans FleetVision based on the certification description from the **DESCRIPTION** field.

To match certification records within the VersaTrans RP application, go to:

Path: Tools > Integration > Match Certifications

1. Follow the above path to display the Certification Matching dialog.



Certifications between VersaTrans RP/TripTracker, and VersaTrans FleetVision are matched using the certification description in the **DESCRIPTION** field.

The upper section of the Certification Matching dialog contains two lists displaying the available certifications for Matching VersaTrans RP/TripTracker Certifications and VersaTrans FleetVision Certifications. The lower section of the dialog contains a Matched Certification list that automatically displays the certifications that currently match. When you manually match and save certifications, this list will also display those certifications.

The certification description in the **DESCRIPTION** field is the unique identifier between VersaTrans RP/TripTracker and VersaTrans RP certifications and VersaTrans FleetVision certifications. The certifications are matched when the descriptions match.

1. You can click on a field name to sort by that name. For example, you can click on the **DESCRIPTION** field to alphabetically sort the certification descriptions.
2. Click on a description in the left or right list and edit the description so that it matches the corresponding description in the opposite list. For example, click on certification description "First Aid & CPR" in the VersaTrans FleetVision Certifications list and edit it to read "First Aid" to match the certification description in the VersaTrans RP/TripTracker and VersaTrans RP list.
3. Click

and the matching certification is moved to the Matched Certification list.

   The certification description in the Certifications list in FleetVision will automatically be changed from "First Aid & CPR" to "First Aid". If the change had been made on the VersaTrans RP/TripTracker certification description, the change would have automatically been made in the VersaTrans TripTracker/RP Certifications list.

   Note: *You must click Refresh in the Certifications list to see the change.*

4. If a certification description exists in the VersaTrans RP/TripTracker list but not in the VersaTrans FleetVision list, you can click on the VersaTrans RP/TripTracker description and then click < to move it to the FleetVision list or vice versa.
5. Click **SAVE** and the matching certification # is moved to the Matched Certification list.
6. Click the Close button when you are finished matching certifications.

Adding, Editing, and Deleting Certification Records

The table below describes the interaction between VersaTrans RP/TripTracker and VersaTrans FleetVision certification records.

VersaTrans RP	VersaTrans FleetVision
Add Certification record	The certification record appears when you refresh the Certification list.
Delete Certification record	There is no change in VersaTrans FleetVision
Edit Certification duration	The certification duration change is reflected once you re-open the Certification record

Maintenance and Transmittal of Certification Records

Certifications are handled differently in VersaTrans RP/TripTracker than they are in VersaTrans FleetVision requiring that the maintenance of these records be limited to employees of record type “Driver”.

The following behavior takes place when transmitting certification updates in VersaTrans RP/TripTracker to VersaTrans FleetVision.

- The changes will be propagated only on RP/TripTracker employee records with the Driver checkbox ON.
- When a certification is edited or added to an employee in RP/TripTracker, the program checks for the existence of the same certification (based on description) in the VersaTrans FleetVision employee record. If one exists, updates are made. If the certifications is not already applied to the employee, the program further checks to see if the certification record exists in VersaTrans FleetVision (based on description). If such a certification is found, it is then applied to the employee.

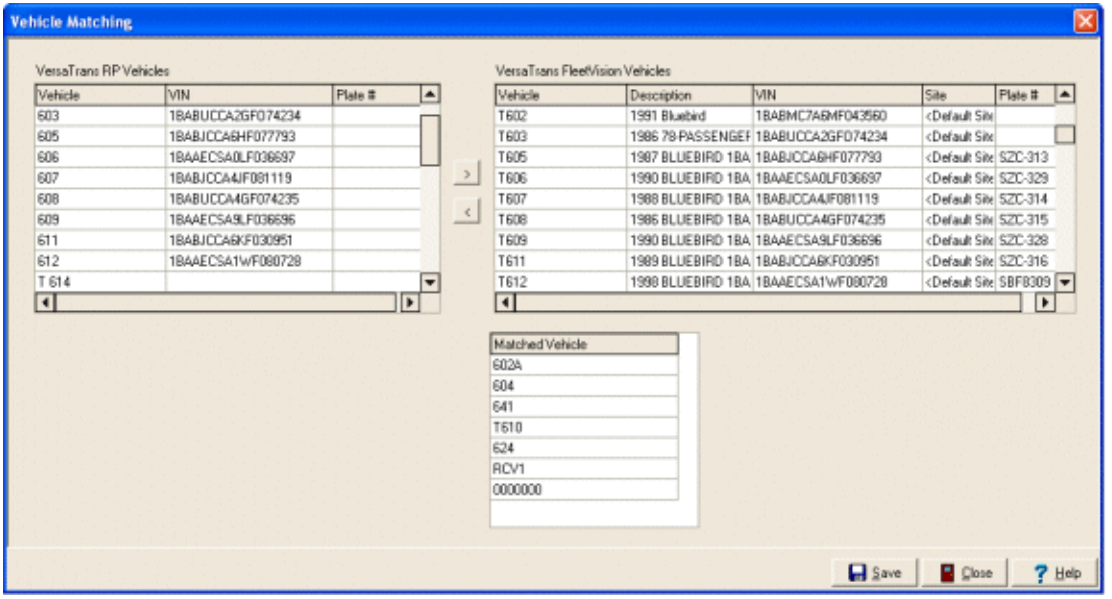
Matching Vehicle Records

Allows you to associate similar vehicles in RP/TripTracker with similar vehicles in VersaTrans FleetVision by Vehicle #.

To match vehicle records within the VersaTrans RP application, go to:

Path: Tools > Integration > Match Vehicles

1. Follow the above path to display the Vehicle Matching dialog.



The upper section of the Vehicle Matching dialog contains two lists displaying the available vehicles for Matching RP/TripTracker Vehicles and VersaTrans FleetVision Vehicles. The lower section of the dialog contains a Matched Vehicle list that automatically displays the vehicles that currently match. When you manually match and save vehicles, this list will also display those vehicles.

The vehicle # (ie.603) in the **VEHICLE** field is the unique identifier between RP/TripTracker vehicles and VersaTrans FleetVision vehicles. The vehicles are matched when the vehicle #'s match.

1. You can click on a field name to sort by that name. For example, you can click on the Vehicle field label to sort by vehicle order.

1. Click on a vehicle # in the left or right list and edit the vehicle # so that it matches the corresponding vehicle # in the opposite list. For example, click on vehicle # T603 in the VersaTrans FleetVision Vehicles list and edit it to read 603 to match the vehicle # in the VersaTrans RP list.
2. Click

and the matching vehicle # is moved to the RP/TripTracker Matched Vehicle list.

   The vehicle # in the Vehicles list in FleetVision will automatically be changed from T603 to 603. If the change had been made on the RP/TripTracker vehicle #, the change would have automatically been made in the RP/TripTracker Vehicles list.

   Note: *You must click Refresh in the Vehicles list to see the change.*

3. If a vehicle # exists in the RP/TripTracker list but not in the VersaTrans FleetVision list, you can click on the FleetVision vehicle # and then click to move it to the RP/TripTracker list or vice versa.
4. Click

and the matching vehicle # is moved to the Matched Vehicle list.
5. Click the

button when you are finished matching vehicles.

Adding, Editing, and Deleting Vehicle Records

The table below describes the interaction between RP/TripTracker and VersaTrans FleetVision vehicle records.

VersaTrans RP	VersaTrans FleetVision

Add vehicle record	The vehicle record appears when you refresh the vehicle list
Delete vehicle record	The vehicle record is changed to “Inactive”
Edit vehicle record	The vehicle record changes are visible once the RP/TripTracker user saves changes and the FleetVision user refreshes the list

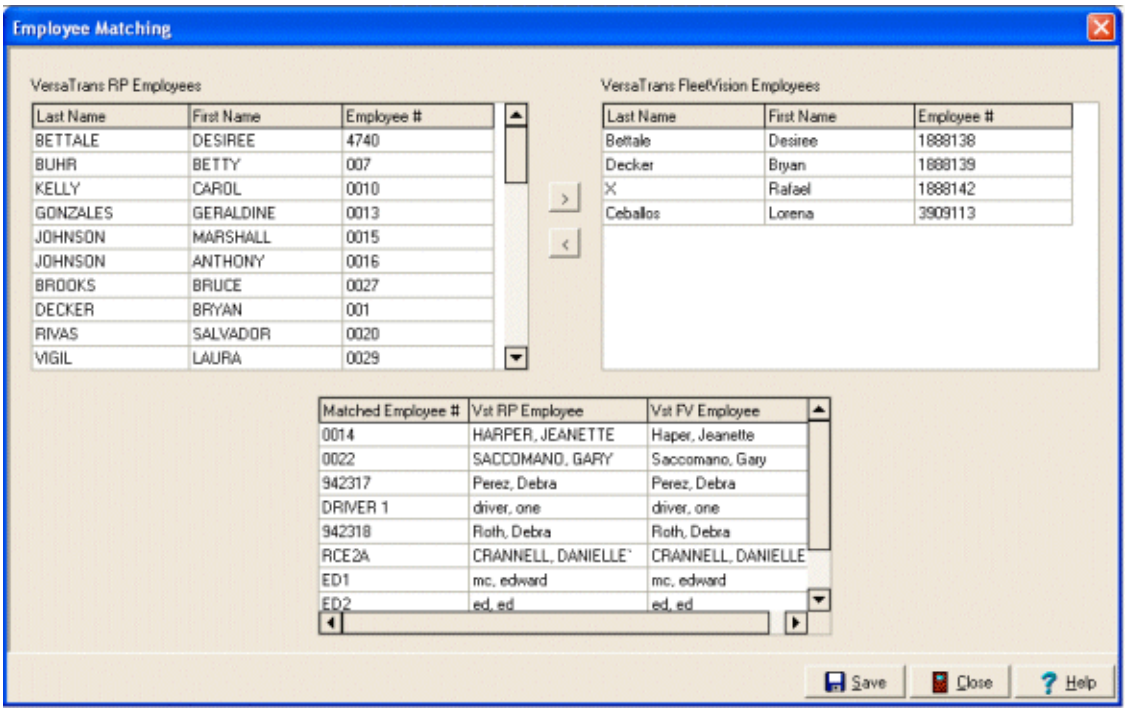
Matching Employee Records

Allows you to associate similar RP/TripTracker employees and similar VersaTrans FleetVision employees of type/classification "driver".

To match employee records within the VersaTrans RP application go to:

Path: Tools > Integration > Match Employees

1. Follow the above path to display the Employee Matching dialog.


Employee Matching
VersaTrans RP Employees
Last Name | First Name | Employee #
BETTALE | DESIREE | 4740
BUHR | BETTY | 007
KELLY | CAROL | 0010
GONZALES | GERALDINE | 0013
JOHNSON | MARSHALL | 0015
JOHNSON | ANTHONY | 0016
BROOKS | BRUCE | 0027
DECKER | BRYAN | 001
RIVAS | SALVADOR | 0020
VIGIL | LAURA | 0029
VersaTrans FleetVision Employees
Last Name | First Name | Employee #
Bettale | Desiree | 1888138
Decker | Bryan | 1888139
X | Rafael | 1888142
Ceballos | Lorena | 3909113
Matched Employee # | Vst RP Employee | Vst FV Employee
0014 | HARPER, JEANETTE | Haper, Jeanette
0022 | SACCOMANO, GARY | Saccomano, Gary
942317 | Perez, Debra | Perez, Debra
DRIVER 1 | driver, one | driver, one
942318 | Roth, Debra | Roth, Debra
RCE2A | CRANNELL, DANIELLE` | CRANNELL, DANIELLE
ED1 | mc, edward | mc, edward
ED2 | ed, ed | ed, ed
Save
Close
Help

The upper section of the Employee Matching dialog contains two lists displaying the available employees for Matching RP/TripTracker Employees and VersaTrans FleetVision Employees. The lower section of the dialog

contains a Matched Employee list that automatically displays the employees that currently match. When you manually match and save employees, this list will also display those employees.

The employee **#** in the **EMPLOYEE #** field is the unique identifier between VersaTrans FleetVision employees and RP/TripTracker employees. The employees are matched when the Employee #'s match.

1. You can click on a field name to sort by that name. For example, you can click on the Last Name field label to sort by alphabetical order.
2. Click on an employee # in the left or right list and edit the employee # so that it matches the corresponding employee # in the opposite list. For example, click on employee # 1888138 in the VersaTrans FleetVision list and edit it to read 4740 to match the employee # in the RP/TripTracker list.
3. Click

and the matching employee # is moved to the Matched Employee list.

   The employee # in the Employee list in FleetVision will automatically be changed from 1888138 to 4740. If the change had been made on the RP/TripTracker employee #, the change would have automatically been made in the RP/TripTracker Employees list.

   Note: *You must click Refresh in the Employee list to see the change.*

4. If an employee # exists in the FleetVision list but not in the RP/TripTracker list, you can click on the FleetVision employee # and then click to move it to the VersaTrans RP list or vice versa.
5. Click **SAVE** and the matching employee # is moved to the Matched Employee list.
6. Click the

button when you are finished matching employees.

Adding, Editing, and Deleting Employee Records

The table below describes the interaction between VersaTrans FleetVision and RP/TripTracker employee records.

VersaTrans RP	VersaTrans FleetVision
Add employee record	Employee record appears when you refreshes employee list
Delete employee record	Employee record is marked “Inactive”
Edit employee record	The employee record changes are visible once the RP/TripTracker user saves changes and the FleetVision user refreshes the employee list

Glossary of VersaTrans TripTracker Terms

A

Account
The budget item you want to charge field trips against. For example, if your organization breaks the field trip budget down by school and then further by group, you might enter the name of the school and the group name in the Account field.

Active Check Box
When a check displays in an Active box, VersaTrans TripTracker considers the record active.

Advance notice for trip cancellation
Number of days in advance a trip must be cancelled. This can be overridden by a system administrator.

Advance notice for trip requests
Number of days in advance a trip must be scheduled. This can be overridden by a system administrator.

Approval Path
Defines the approvers and levels that a trip must go through to be approved for scheduling. An approval path can have multiple levels, and multiple approvers within a level.

Approver
The person(s) who can authorize a field trip.

Arrival Time
The time the bus should arrive at the destination.

B

Budget
Entire amount allocated for an account for a given fiscal period (usually a school year).

Budget Number
This is an internal code that your organization can use to track this transaction. This field is optional, so you do not have to complete it.

Budget Period
See the *Fiscal Period* on page 350.

Budget Warning Limit
The amount limit at which the system emails the Budget Contact. For example, if you enter $150 in this field, the system sends an email to the budget contact when there is $150 or less remaining in the budget for this account.

C

Capacity
The maximum number of people the vehicle can transport.

Charge Basis
The formula the system uses to calculate the trip cost. There can be many charge bases and one default basis.

Clone
Create a new trip by copying the trip request details from an existing trip.

Closed Date
The date the trip is closed.

Completed date
Date on which the trip completion details are entered. This is done after the trip has taken place.

D

Date Approved
The date the current trip is (was) approved.

Deactivating
Deactivating a record leaves it in the database but does not include it in new lists.

Default Charge Basis
You set the appropriate charge basis to act as the default for all trips entered into the system.

Destination
Describes the place the field trip is going to. The opposite of the origin.

Driver Assignment Rules
Flexible rules for defining how the next driver to be assigned a trip is selected.

E

Express Trip
Allows a user with the appropriate permissions the ability to request and approve a trip in a single function. Trip is immediately ready to schedule.

F

Filter(ing)
When you filter a list, you remove the items that do not match a preset criteria and display the shortened list.

Fiscal Period
The term of your budget, usually for districts, the school year.

Fixed charges
Static set of charges defined on the Charge Basis that can be included on an invoice.

H

Hire Date
The date your organization hired this employee. The system may use this date for calculation purposes.

I

Invoice
An itemized list of charges incurred for the trip, including Invoice Date, Invoice number, quantities, and prices.

J

Job category
Specific job function assigned to an employee defining pay rates to be used in creating the invoice.

L

Leave Time
The time the bus should leave the destination.

Location Type
Indicates which type of location you are entering.

Destination Only: If your field trips only go to this location as an end result (not as a starting point for the trip).

Origin Only: If your field trips only start from this location (as in a school or the bus garage location or terminal).

Look Ahead Days
How far ahead you want the program to notify you of approaching expiration dates. For example, if you want to know that a driver's certification is going to expire two weeks ahead of time, type **14** in this field.

O

Origin
This is the place the field trip starts. Most of the time, the trip origin is a school but it does not have to be.

P

Employee Record
Keeps track of individual employee records including personal address information and certifications.

Employee Type
Identifies the type of work an employee does. For example, you might have a driver type, an aide type, etc. You use these records to specify the organization required certification and training for a particular type of work.

R

Reactivate
Move a cancelled trip into the Approval process as an active trip request.

Refusal Date
The date a driver refused a trip. The system defaults to the current date but you can either type over this entry or you can click the down arrow and select the date from the calendar.

Resubmit
Move a rejected trip back into the approval process. See also "Trip Re-submission handling".

Requester
Person requesting a trip.

S

Sales Tax
The sales tax rate percentage that is applicable to trips taken in your organization. For example, if your tax rate is 7.25%, type 7.25 in this field. This is set in the Options screen (System tab).

Seniority
If you want to list employees in a particular order based on seniority, enter the employee's number. See, *Adding an Employee Record* on page 139.

Seniority Date
If you want this employee to use a different date other than the date of hire for seniority purposes, selectan alternate date. See, *Adding an Employee Record* on page 139.

Sit Time
Time during the course of a trip where a driver is not driving a vehicle

Sort
When you sort a list, you rearrange the items in a list in a particular order.

Starting Range
The first number/date/element in the range you want to search for.

Straight Time
The amount this employee receives for regular work hours.

Submitter
The logged in user who enters the data to create the trip request.

Super user
A user account that can access and update any information in the VersaTrans TripTracker application.

System Message
Message entered in the System Options page that will display for all users on the Today screen.

T

Taxable
Setting which indicates whether the current entry should be taxable.

Templates
Templates are structures for emails for the VersaTrans TripTracker system.

Time threshold for trip requests
Time of the day during with trips cannot be scheduled. This pertains to Monday through Friday.

Trip Origin
See *Origin* on page 351.

Trip Re-submission Handling
Option which determines whether a re-submitted trip will begin at the first step of the approval process or step at which it was rejected.

Trip Statuses

Requested
A trip has been submitted and is waiting for approval.

Rejected
A requested trip has been rejected by an approver

Approved
An approver at each level of the approval path has approved the trip

Cancelled
Trip has been cancelled.

Scheduled
The driver(s) and vehicle(s) have been assigned to the trip

Completed
The trip has taken place and all pertinent information needed by the invoice has been entered.

Awaiting Payment
The invoice has been generated for the trip

Partial Payment
A payment has been posted to the trip, but an outstanding balance remains

Paid
The trip has been paid in full

Closed
All action has been taken on the trip; there will be no further updates

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